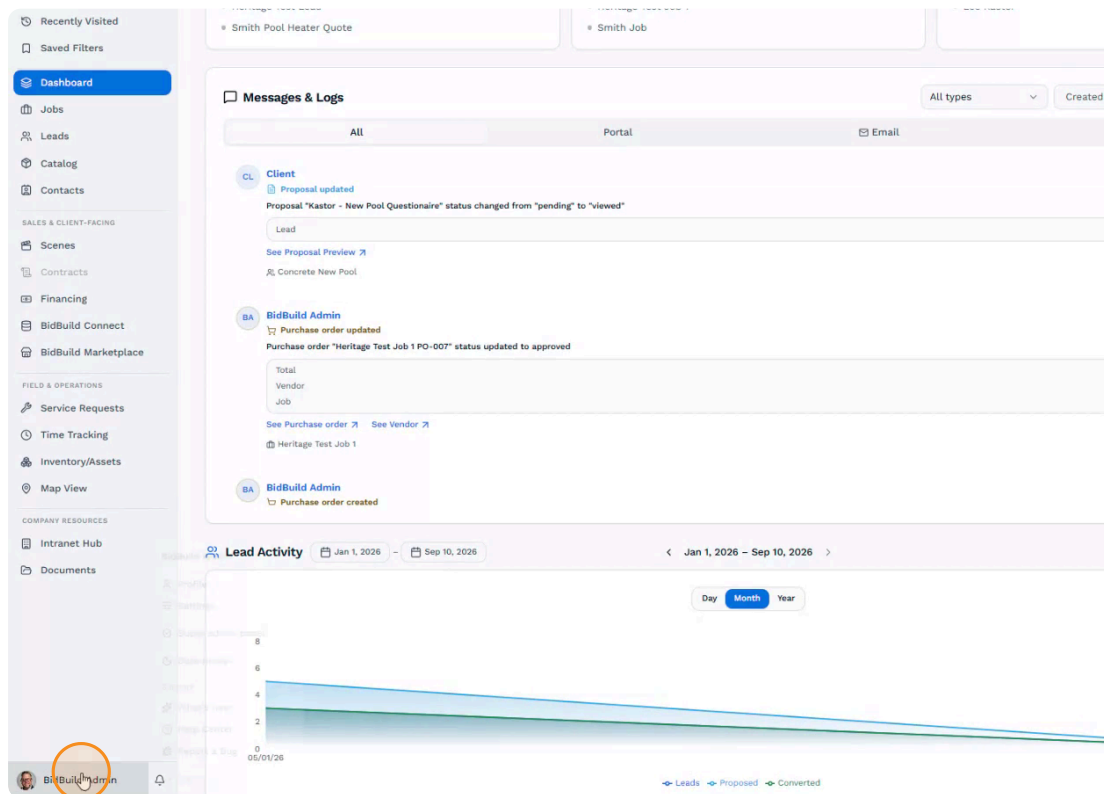


Managing Proposal Templates

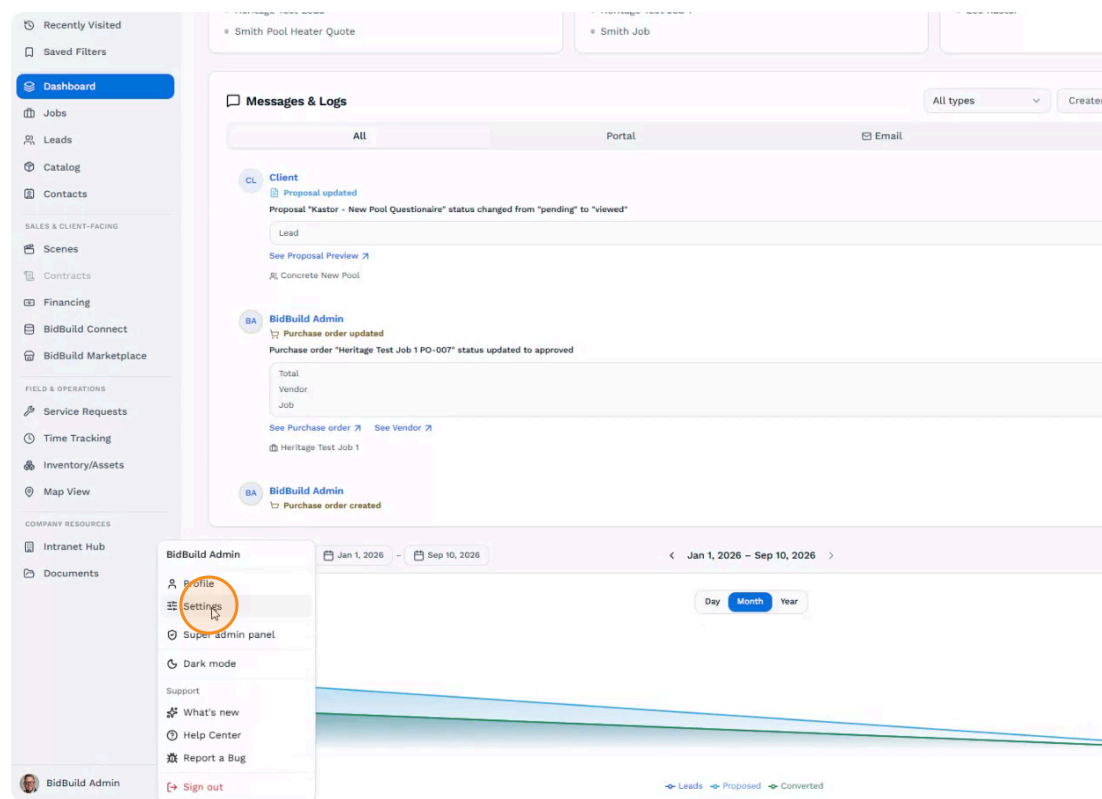
This document explains how to access, create, edit, and organize proposal templates, including managing pages, embedded modules, and content elements within each template.

Step 1: Open Proposal Template Settings

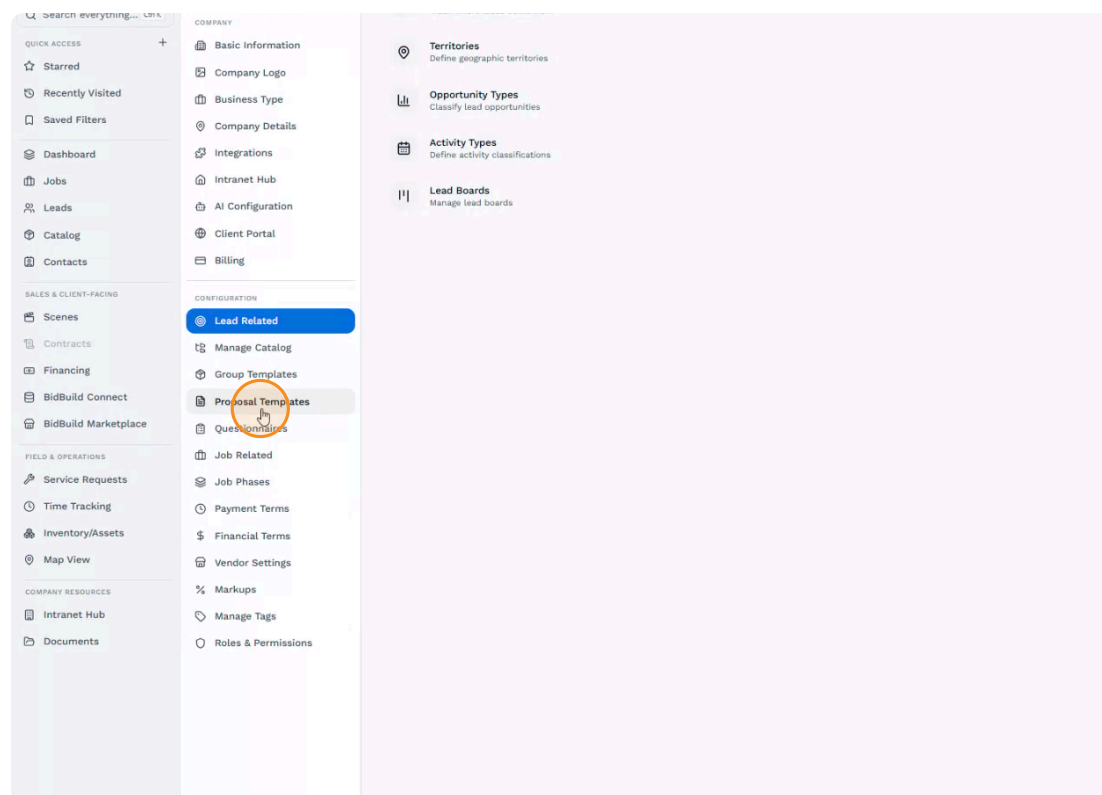
Navigate to the lower-left area of the application and open your settings.



In the settings menu, select **Proposal Templates**.

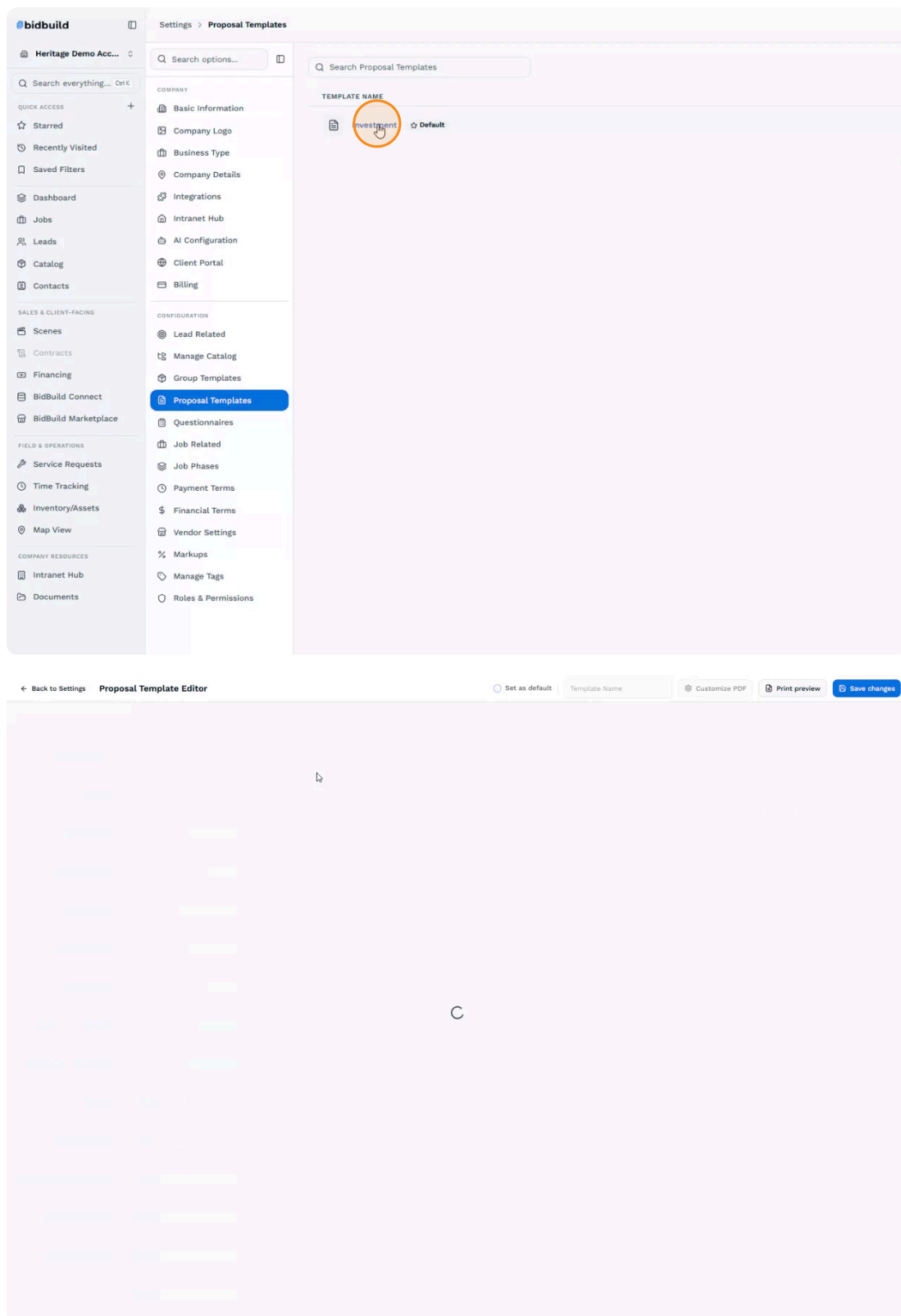


This section contains the full list of existing proposal templates.

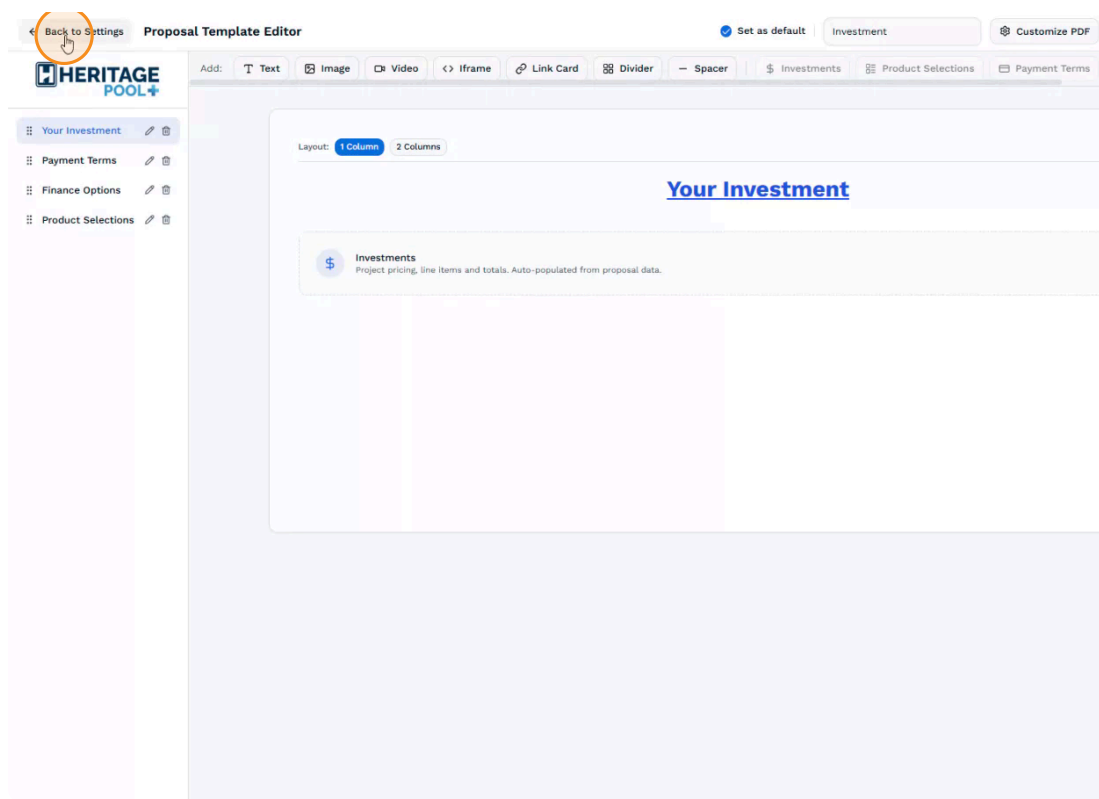


Step 2: Open and Edit an Existing Proposal Template

From the proposal template list, click on the template you want to modify to open it.

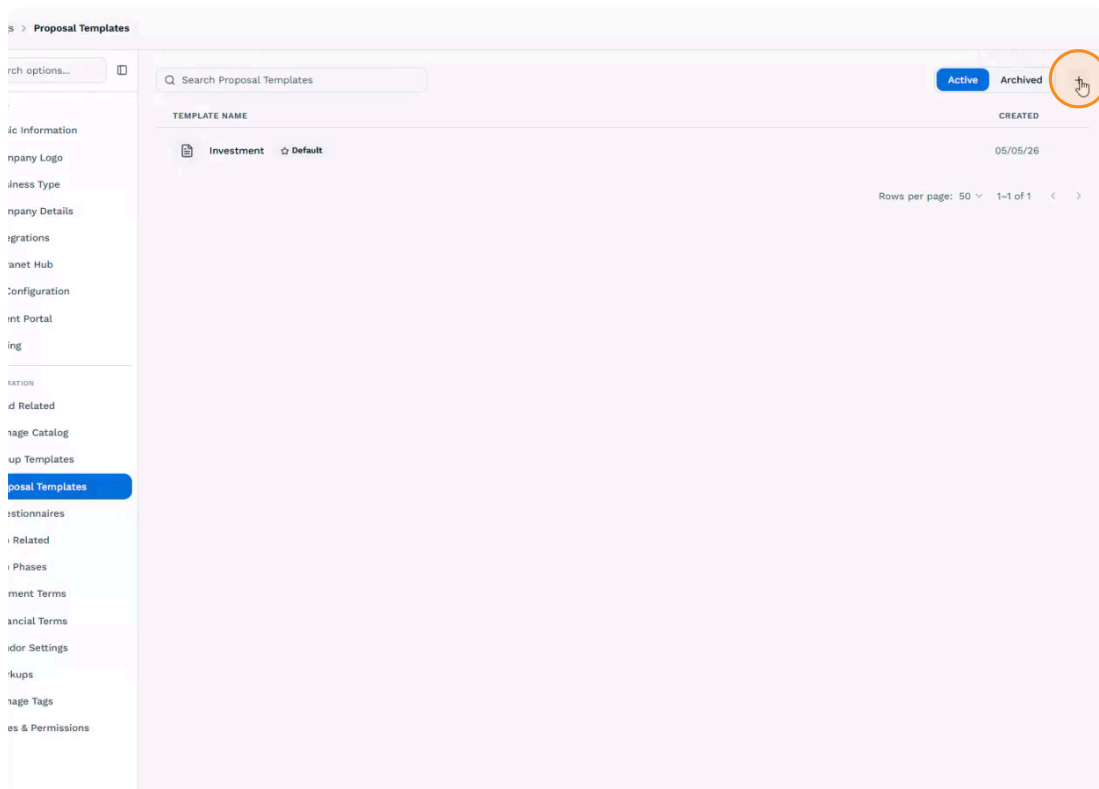


Inside the template, use the **Modify** options to update content and then save your changes.

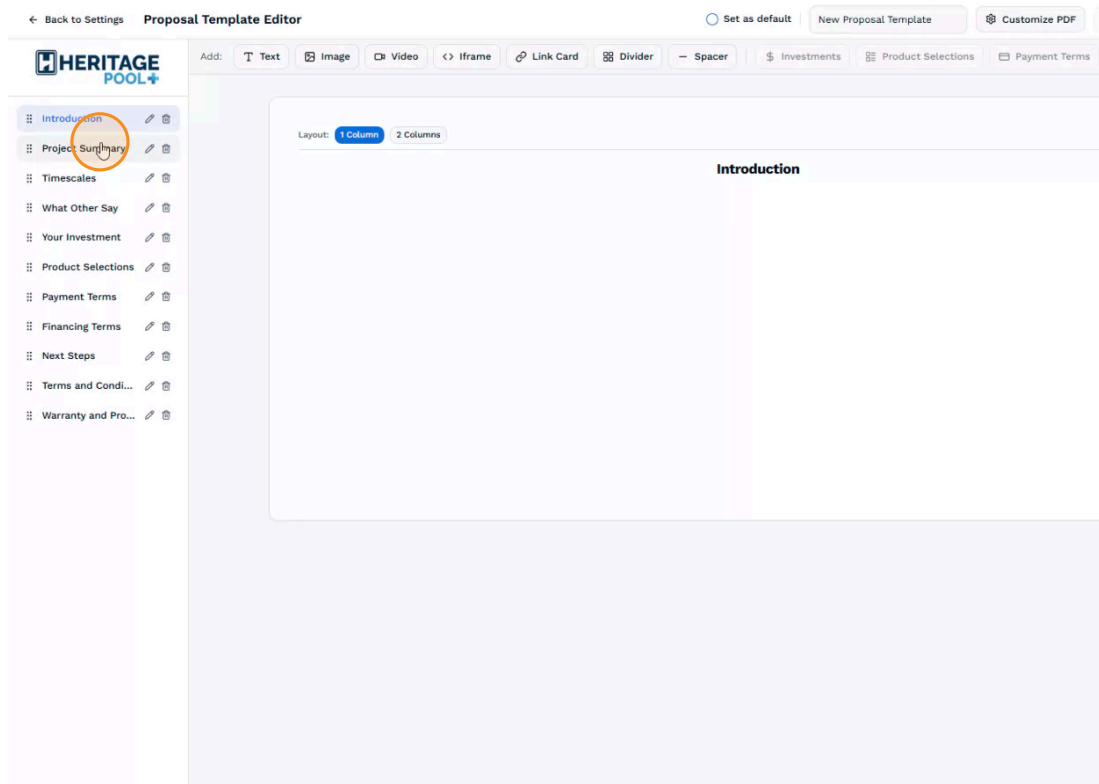


Step 3: Create a New Proposal Template

To add a new proposal template, click the **Plus Proposal Template** button.

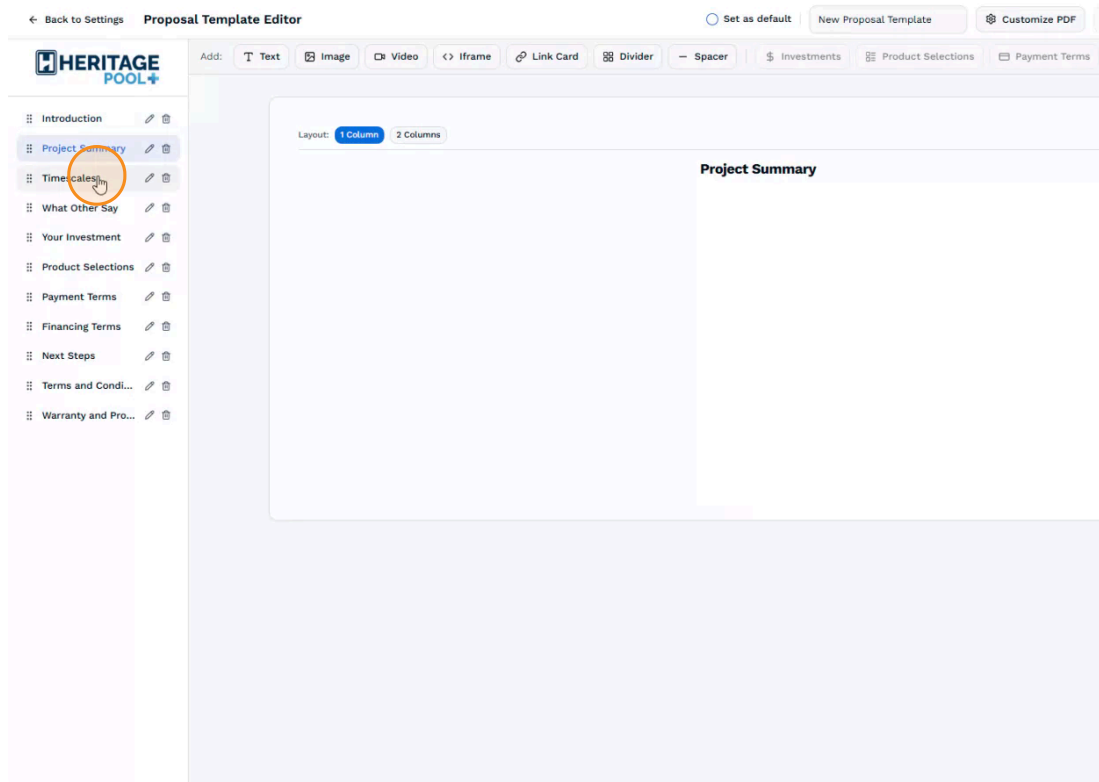


A new template will be created with a starting layout and menu options you can configure.



Step 4: Manage Pages in the Template

From here, you can modify, delete, and manage any of the pages in the template.



← Back to Settings **Proposal Template Editor** Set as default New Proposal Template Customize PDF

HERITAGE POOL+

Add: T Text Image Video Iframe Link Card Divider Spacer \$ Investments Product Selections Payment Terms

Layout: 1 Column 2 Columns

Your Investment

Investments
Project pricing, line items and totals. Auto-populated from proposal data.

Introduction 
Project Summary 
Timescales 
What Other Say 
Your Investment 
Product Selections 
Payment Terms 
Financing Terms 
Next Steps 
Terms and Condi... 
Warranty and Pro... 

any

← Back to Settings **Proposal Template Editor** Set as default New Proposal Template Customize PDF

HERITAGE POOL+

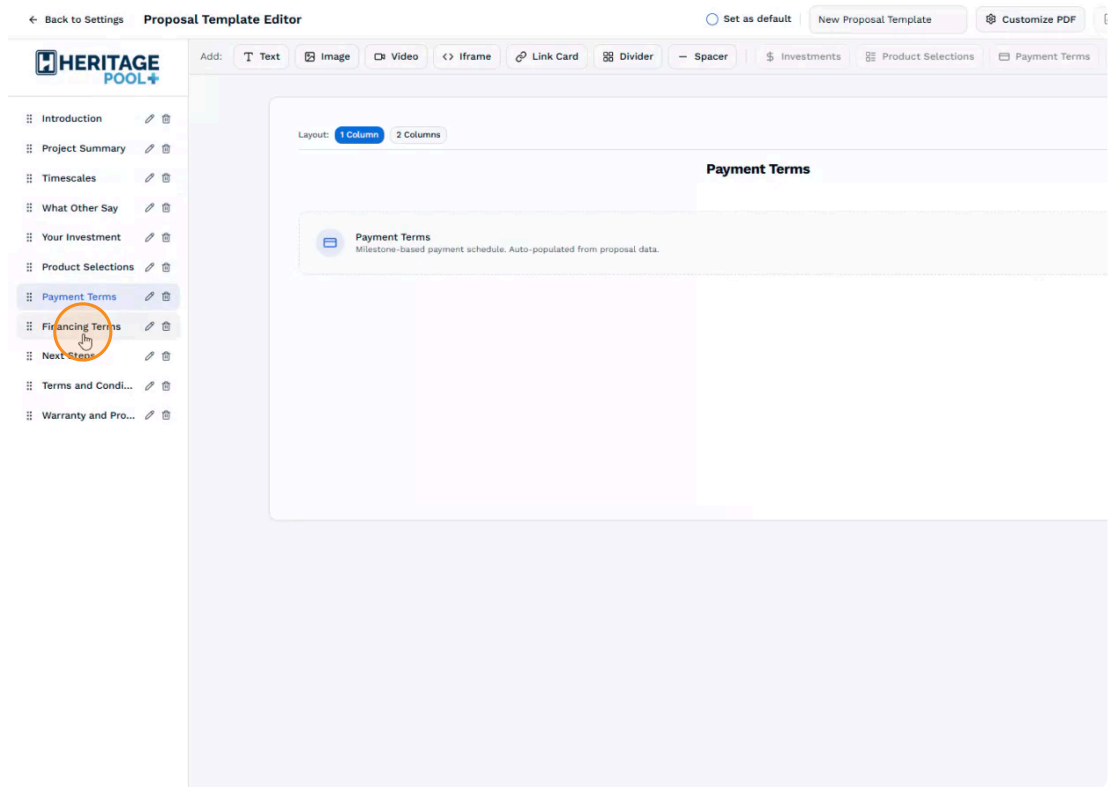
Add: T Text Image Video Iframe Link Card Divider Spacer \$ Investments Product Selections Payment Terms

Layout: 1 Column 2 Columns

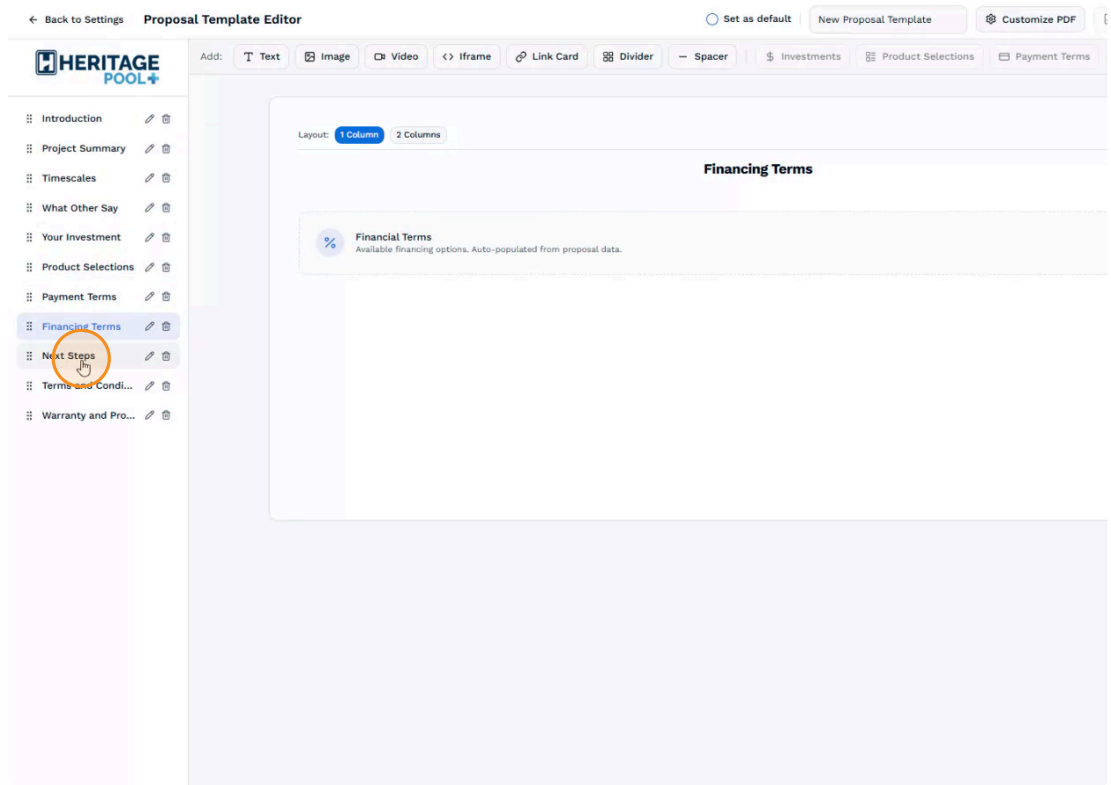
Product Selections

Product Selections
Selected product colors and options. Auto-populated from proposal data.

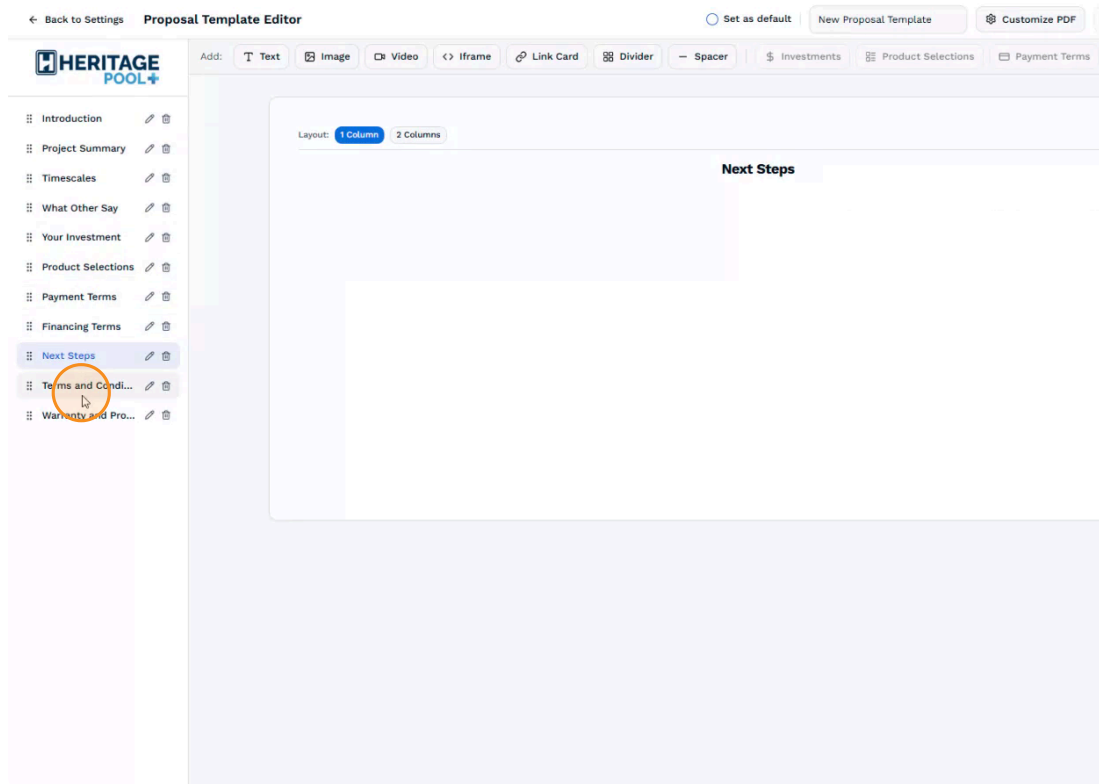
Introduction 
Project Summary 
Timescales 
What Other Say 
Your Investment 
Product Selections 
Payment Terms 
Financing Terms 
Next Steps 
Terms and Condi... 
Warranty and Pro... 



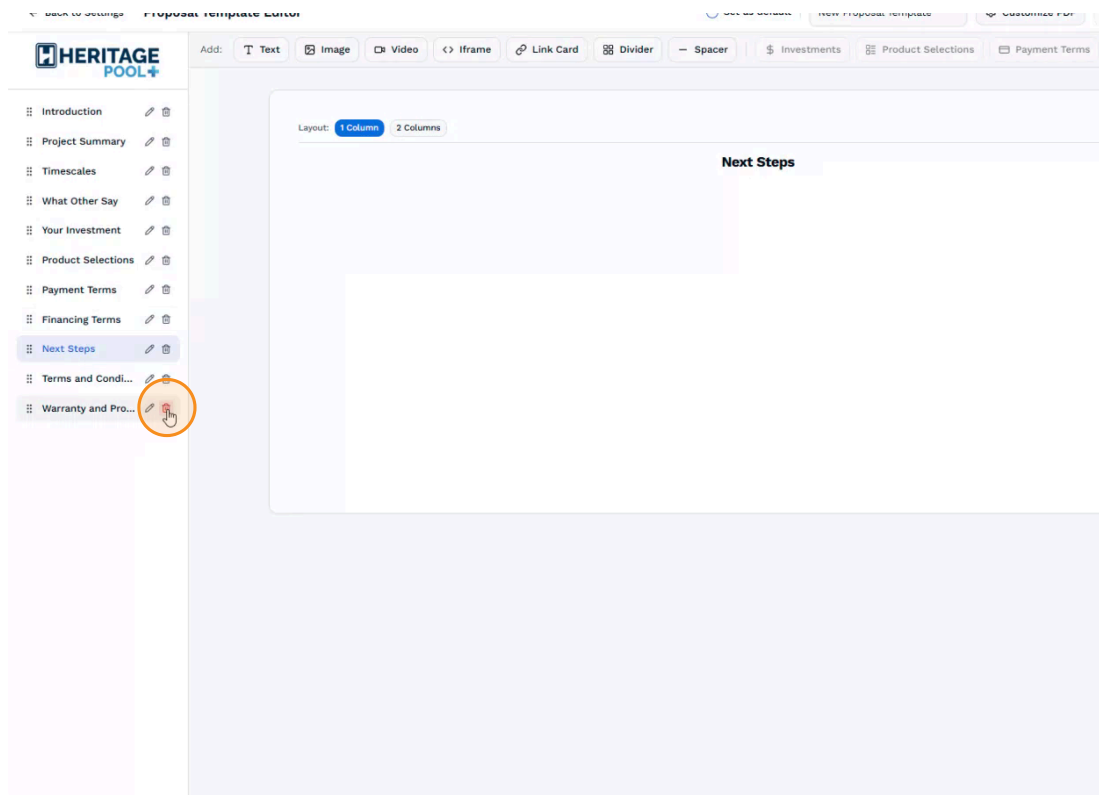
of

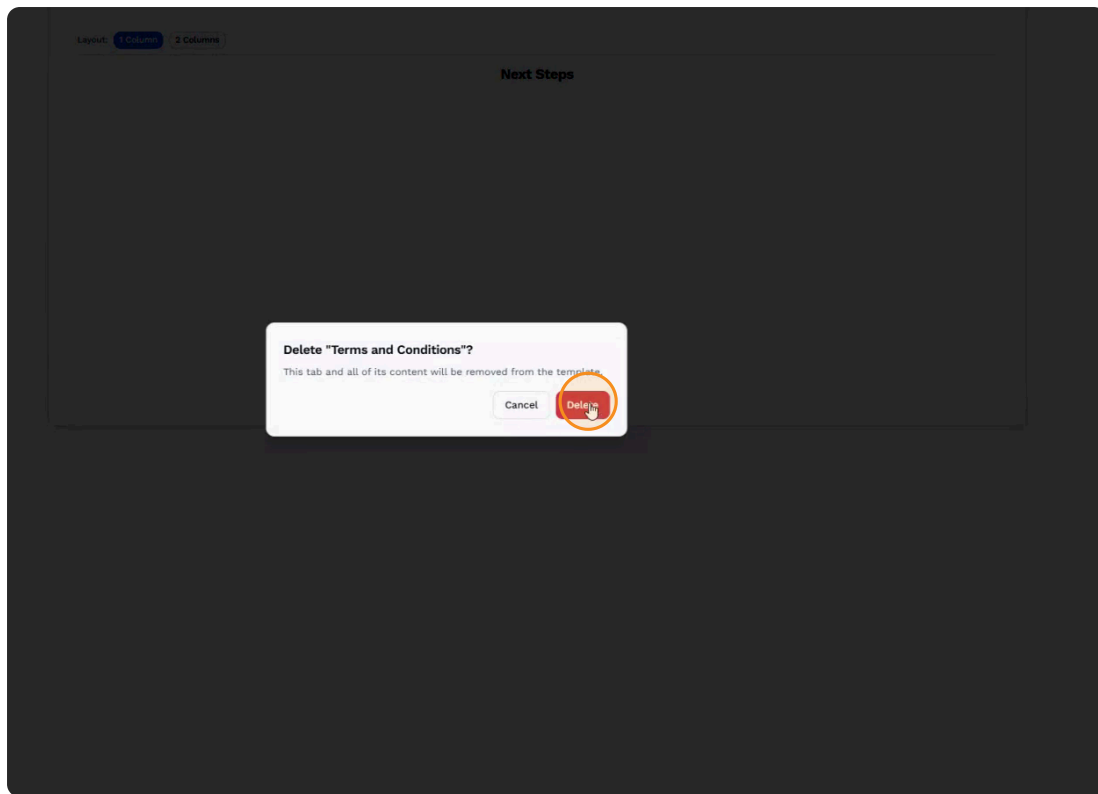


these pages.

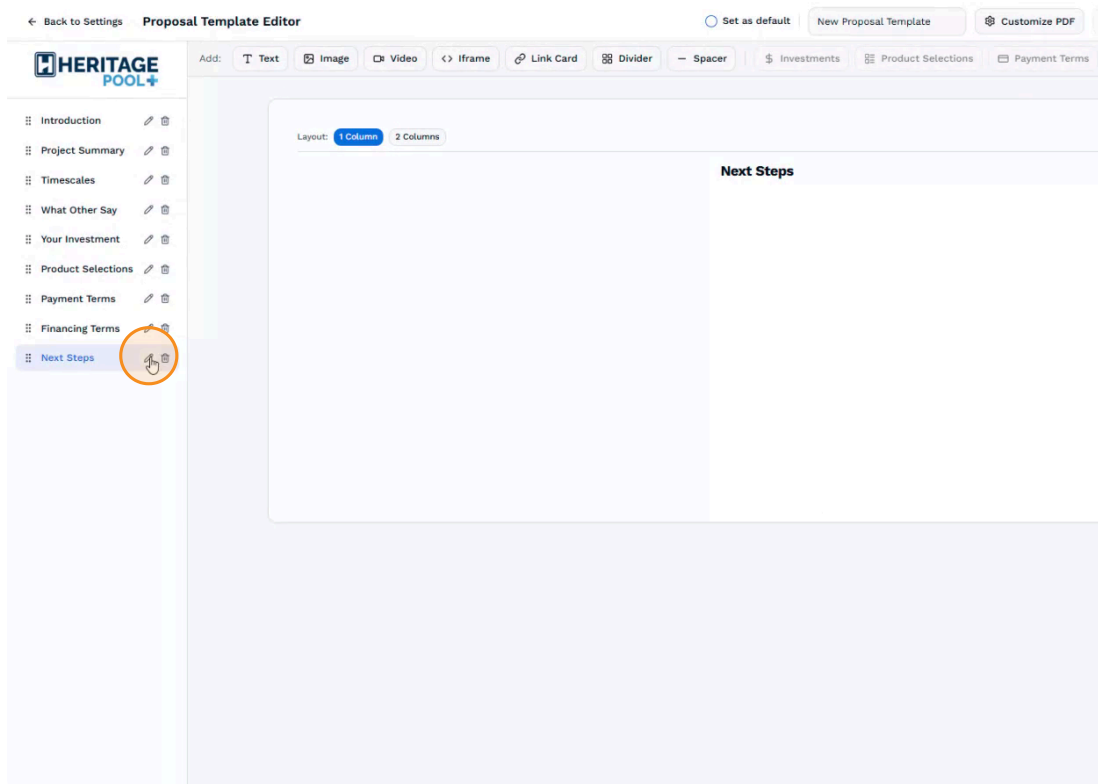


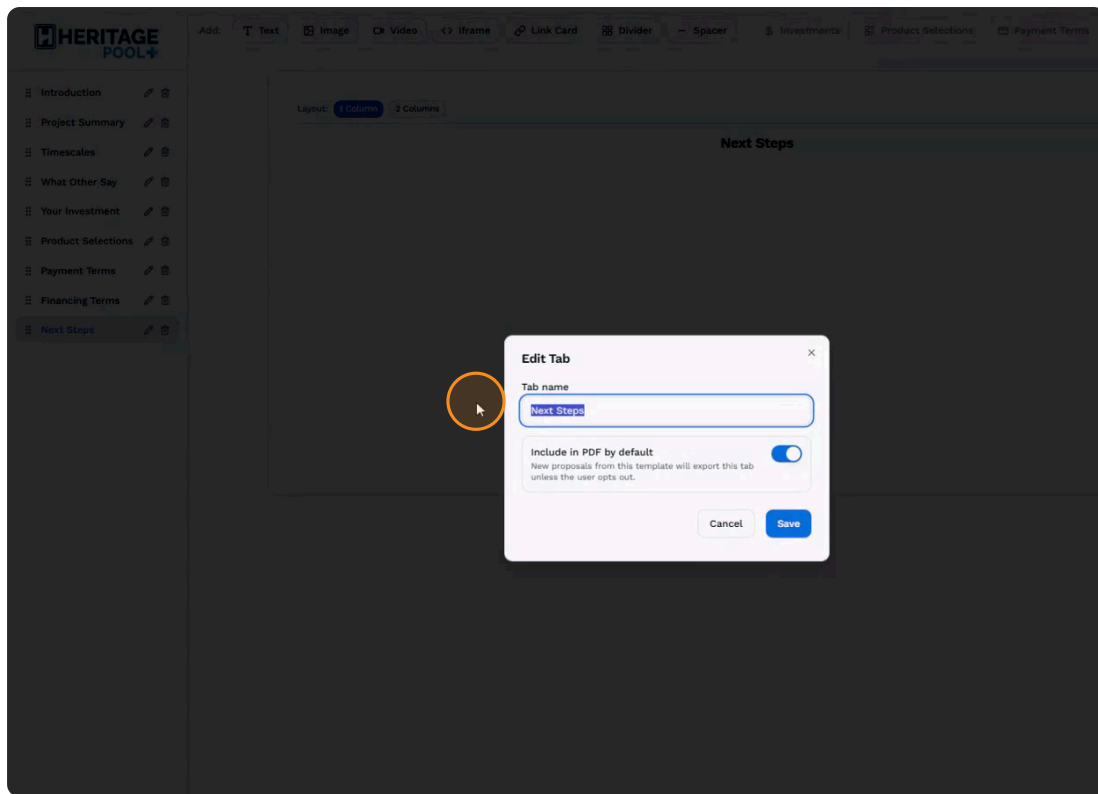
In this example, we will delete a couple of pages that are not needed.





You can also modify existing pages as required.

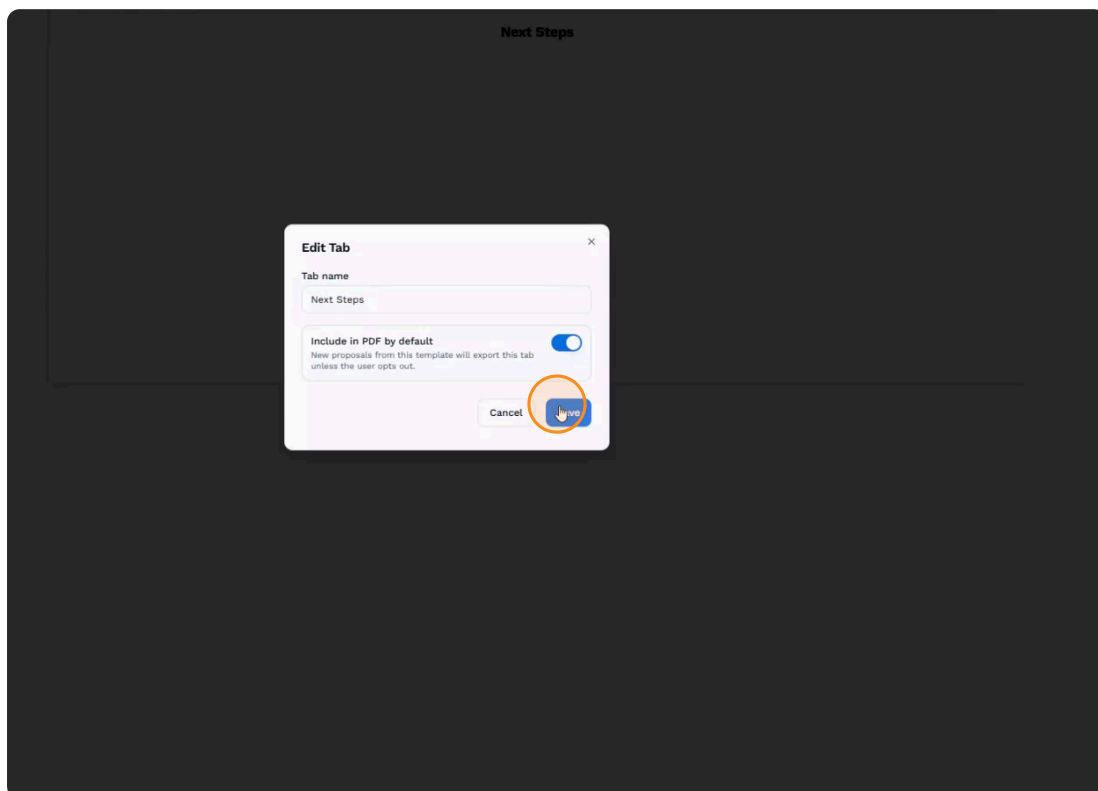




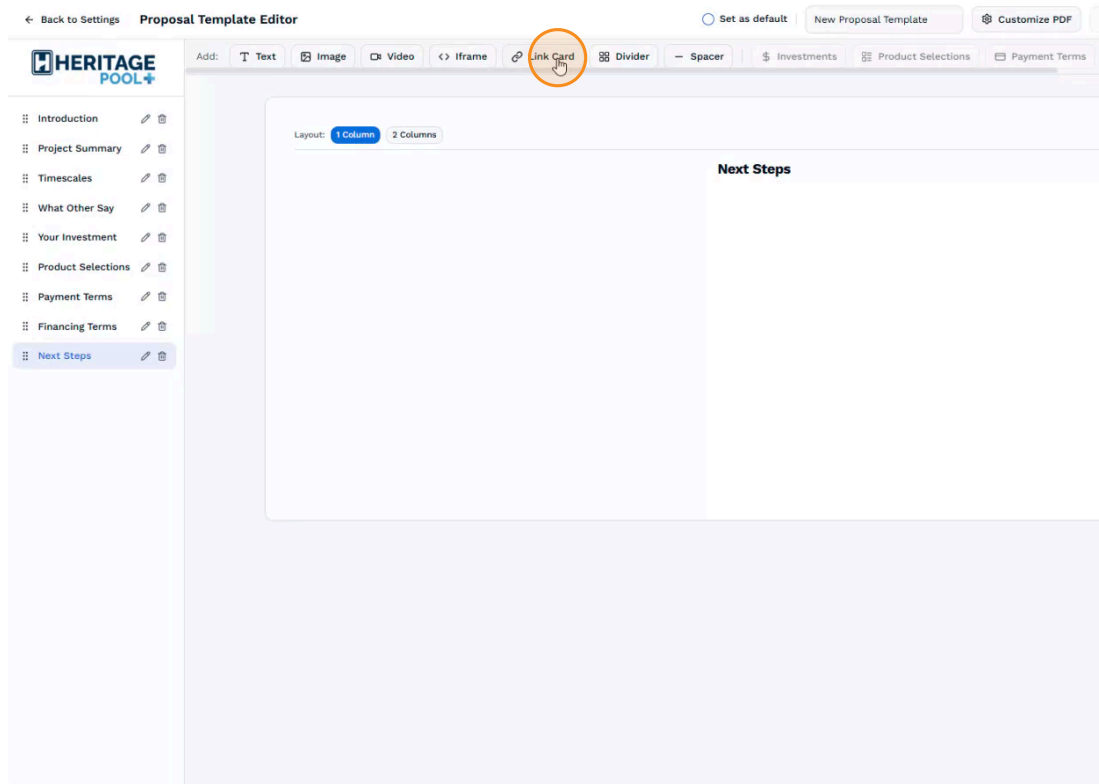
When the radio switch for a page is turned **on**, that page will be included in the PDF document when the client downloads it.

Step 5: Add and Configure Content Within a Page

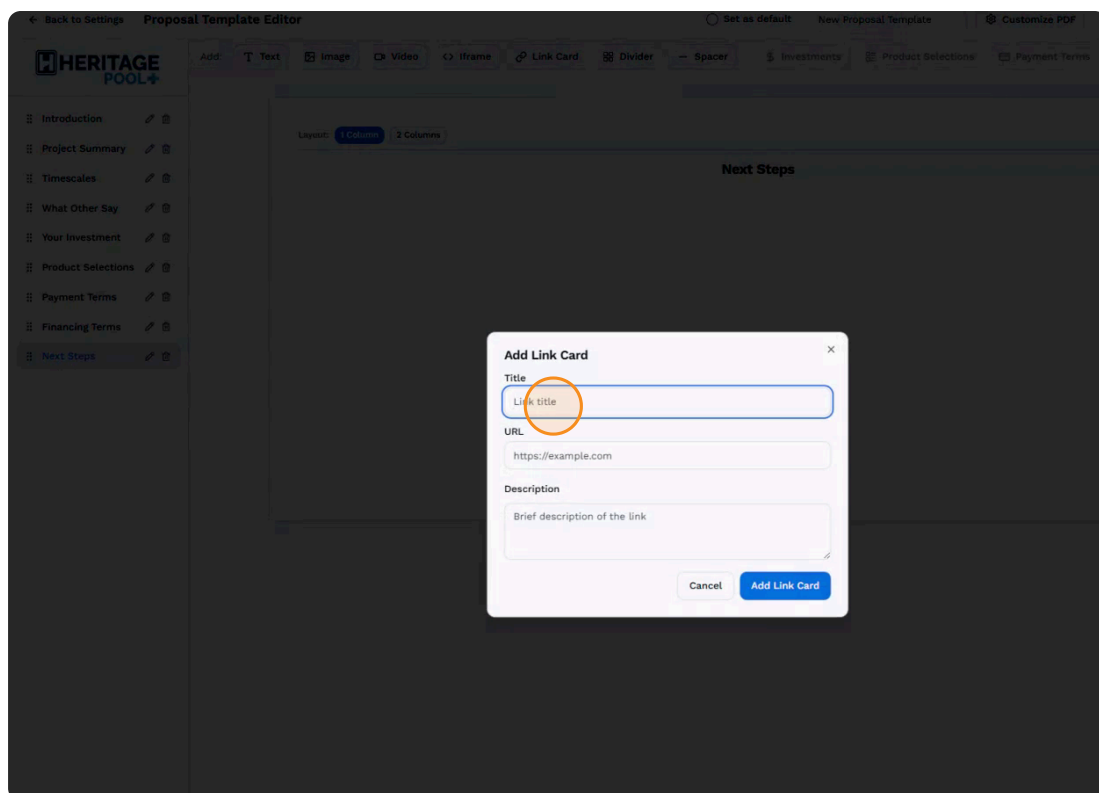
When inside a page, use the toolbar at the top to add content elements.

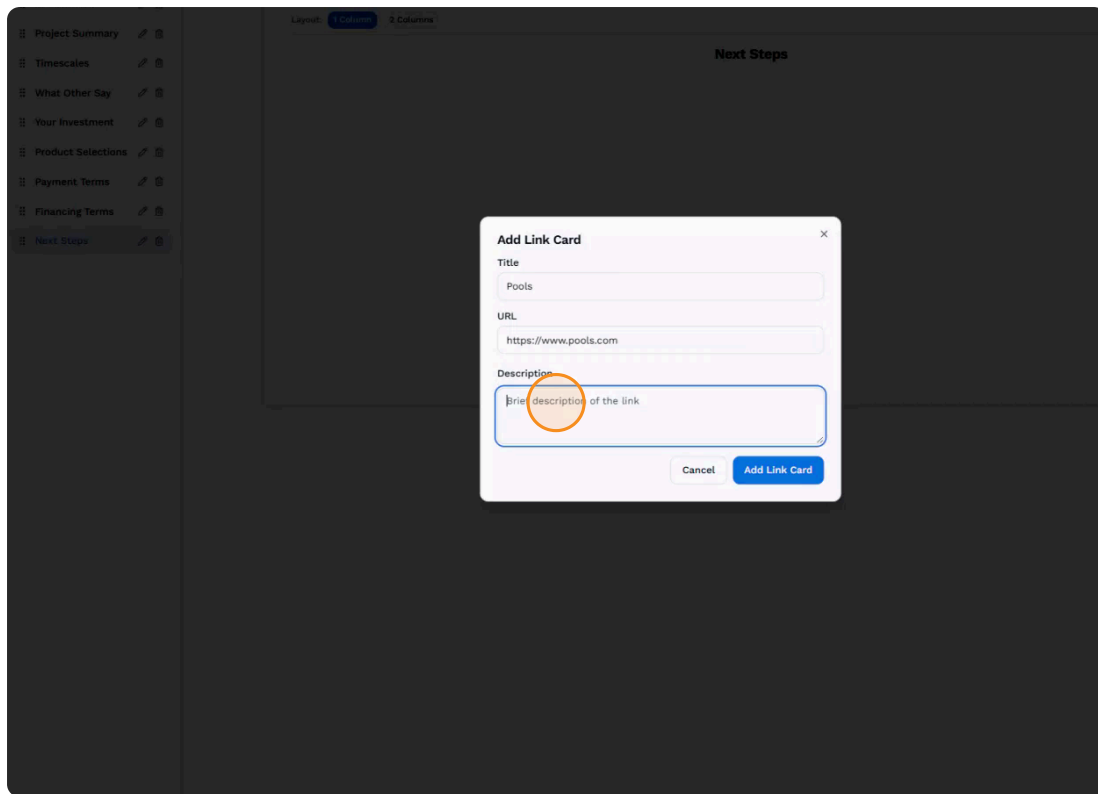


As an example, you can add a **Link Card**.

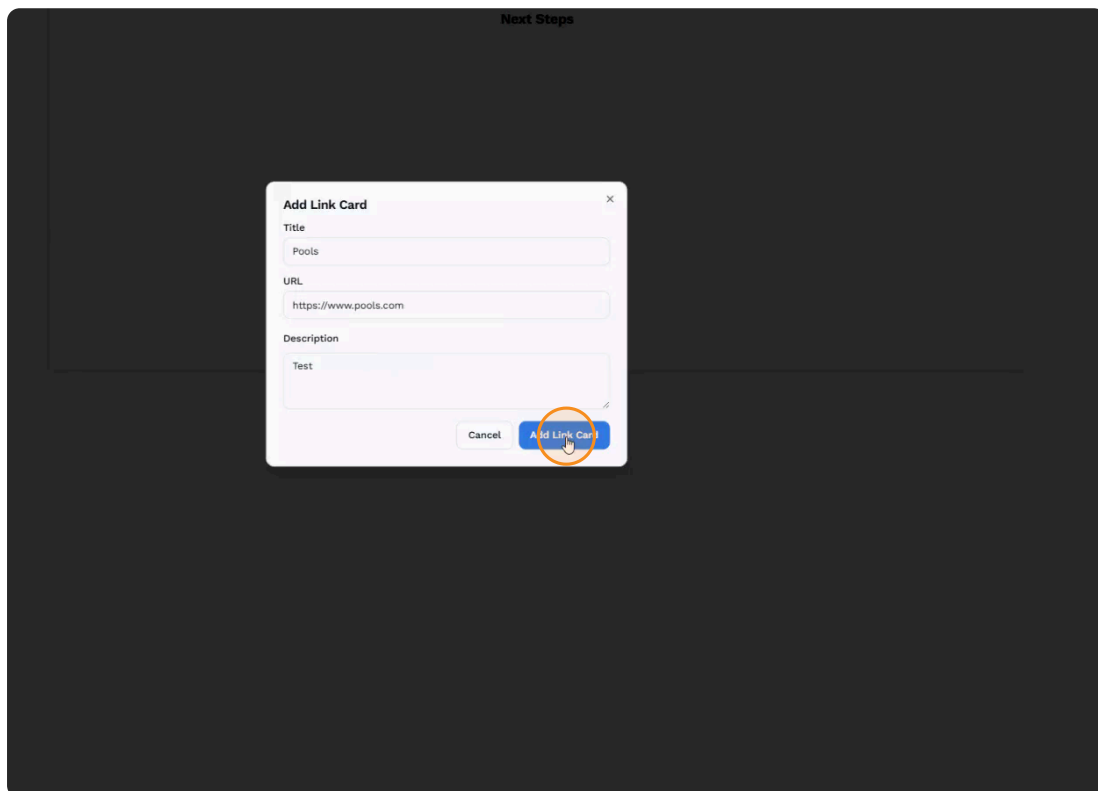


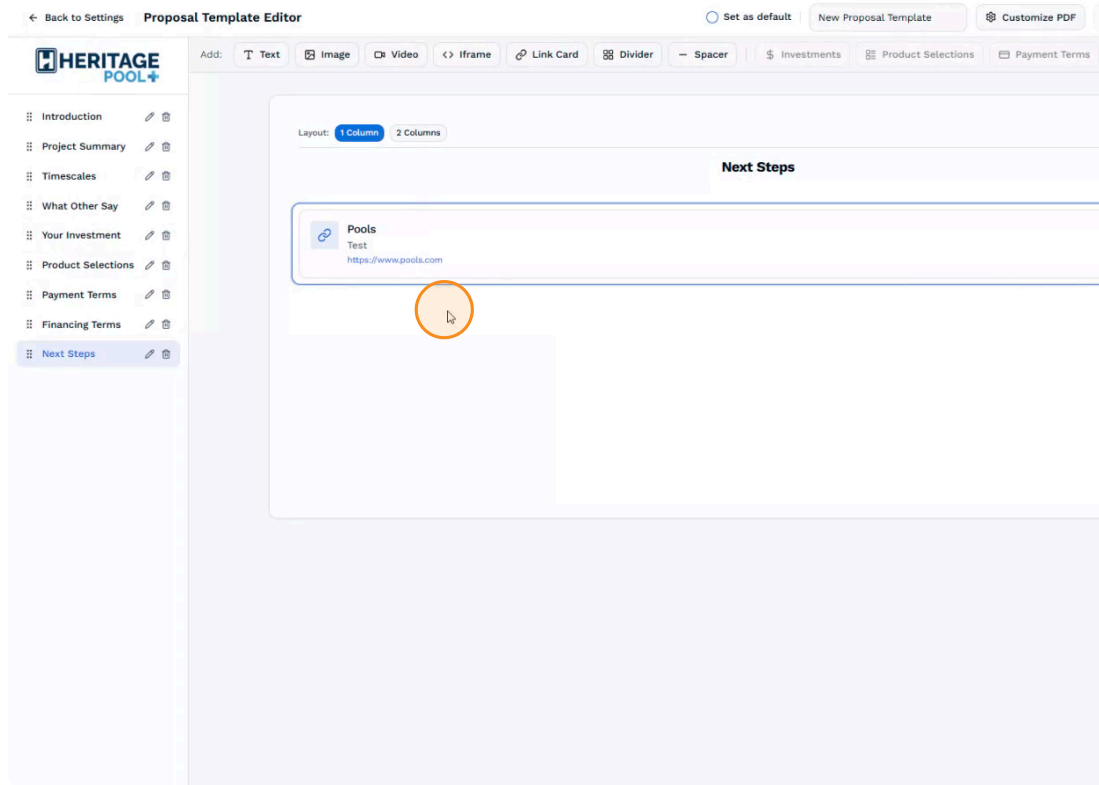
After adding a link card, you can give it a title, specify the URL, and add a brief description.



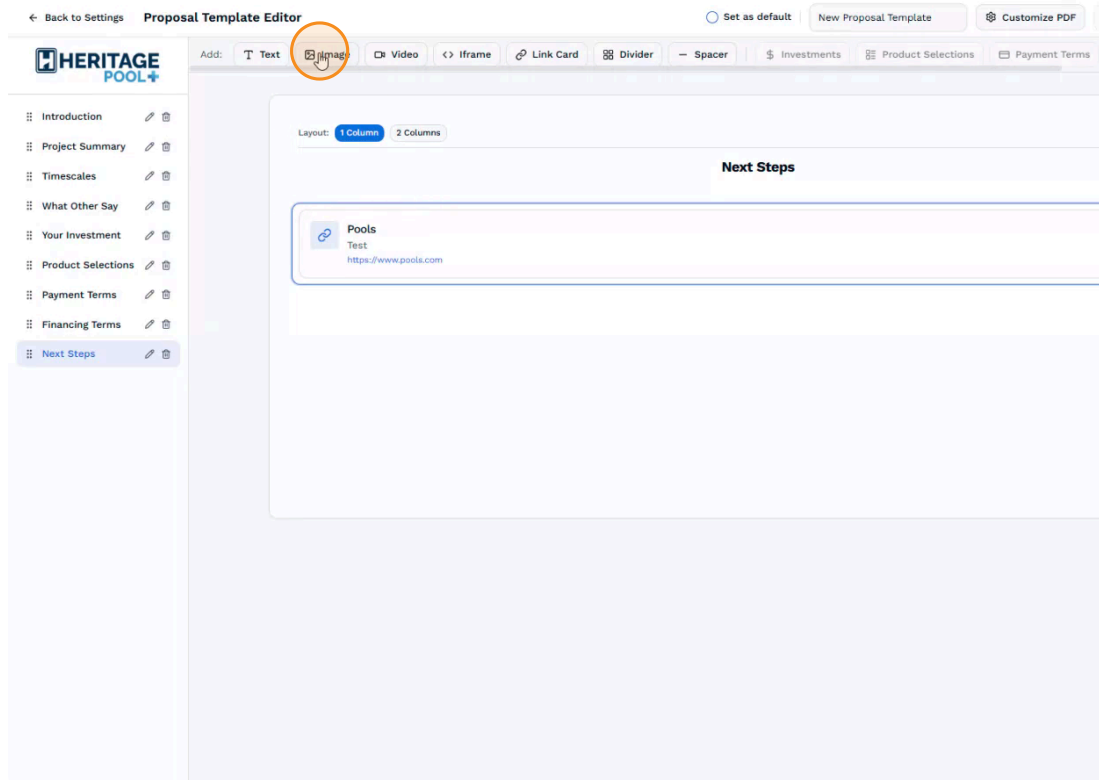


When a client clicks this link card, it will display the configured information and redirect them to the specified link.

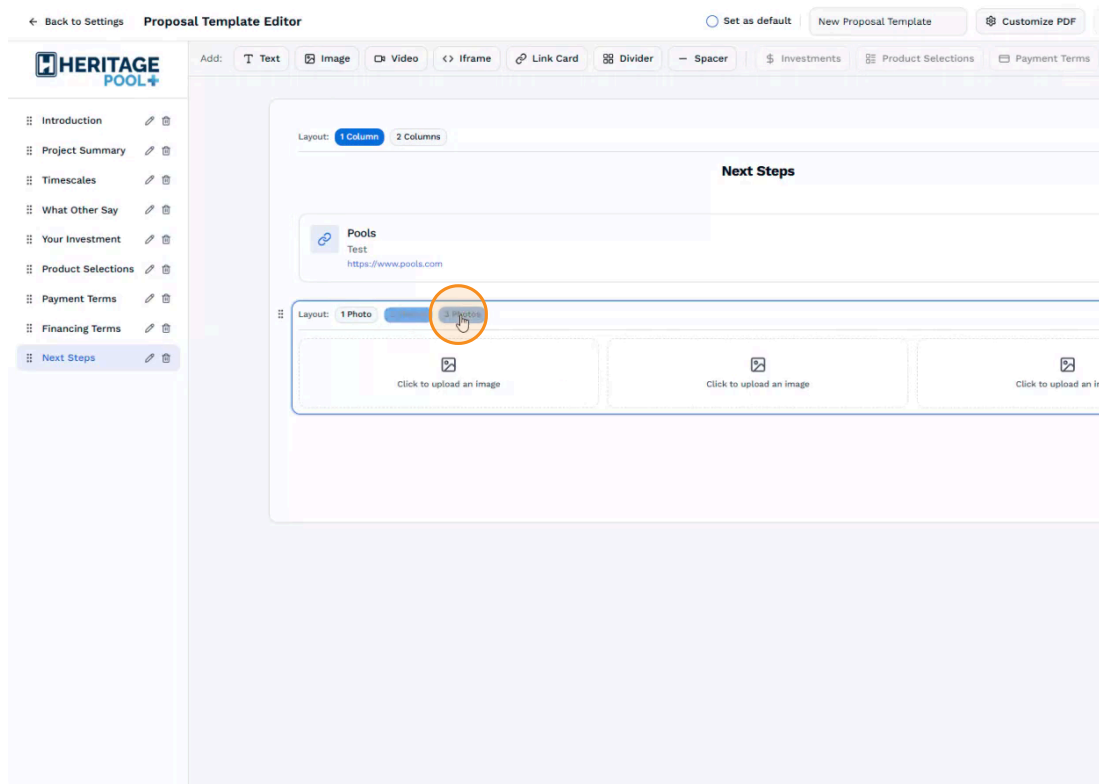
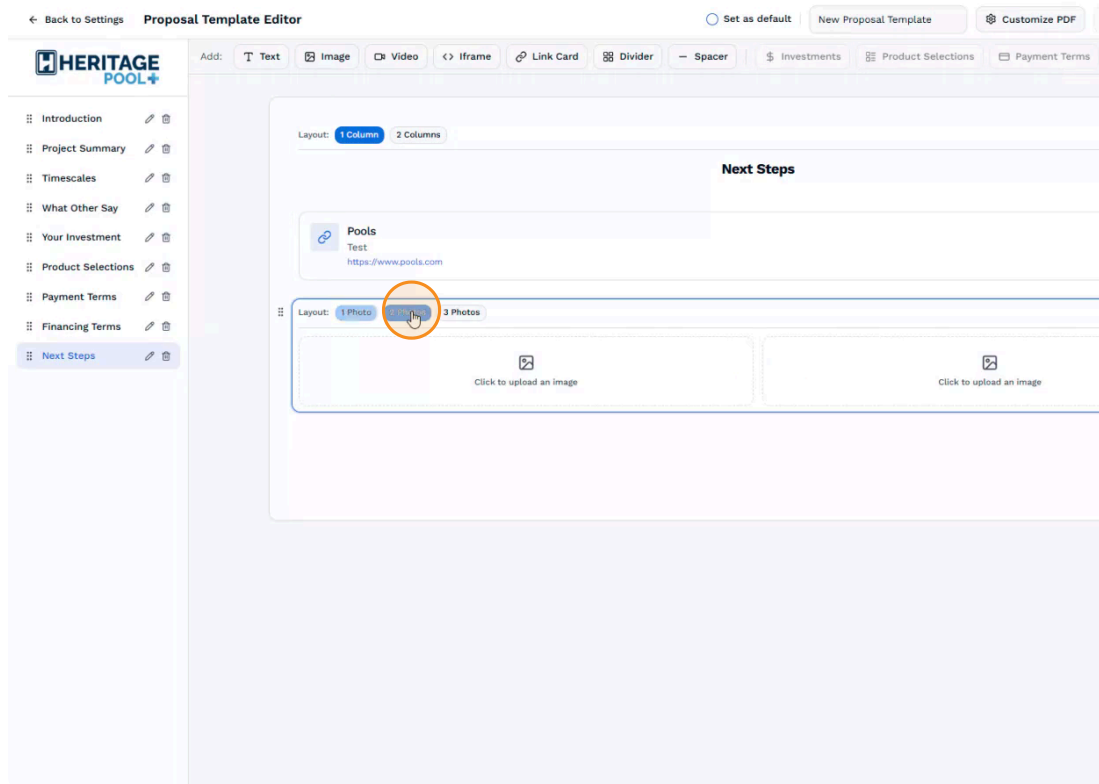




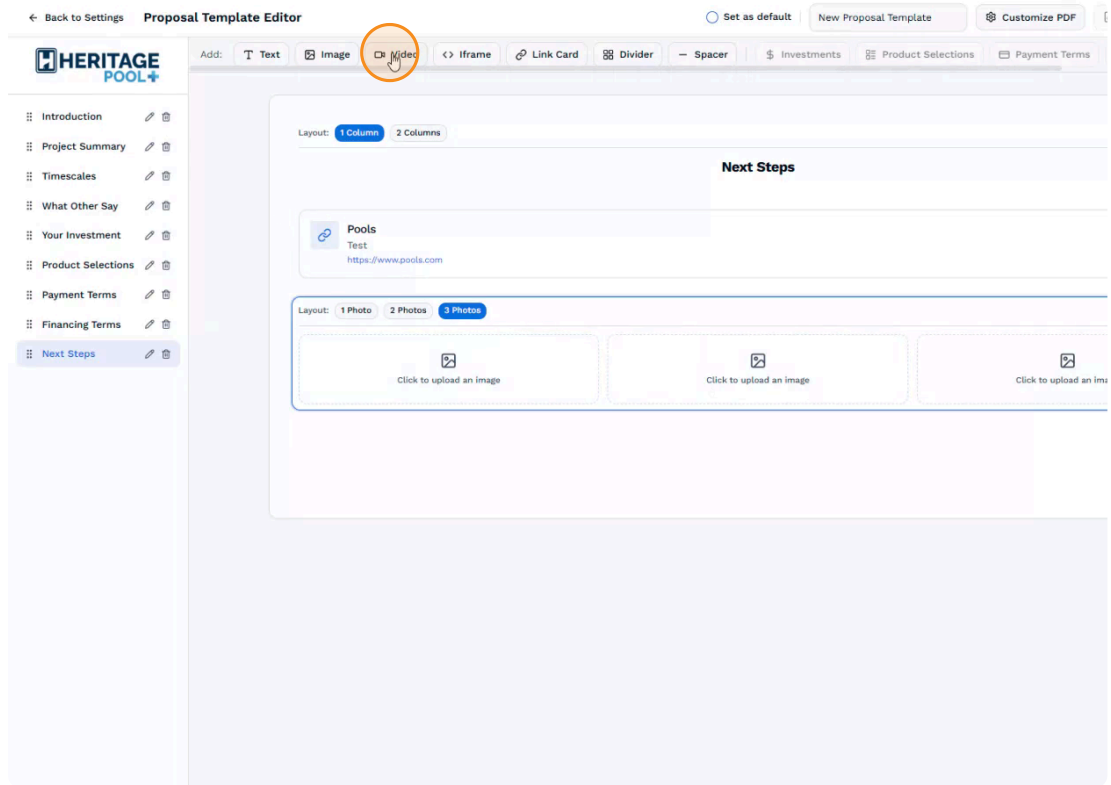
You can also add an **image** and configure how many images can be displayed within that area.



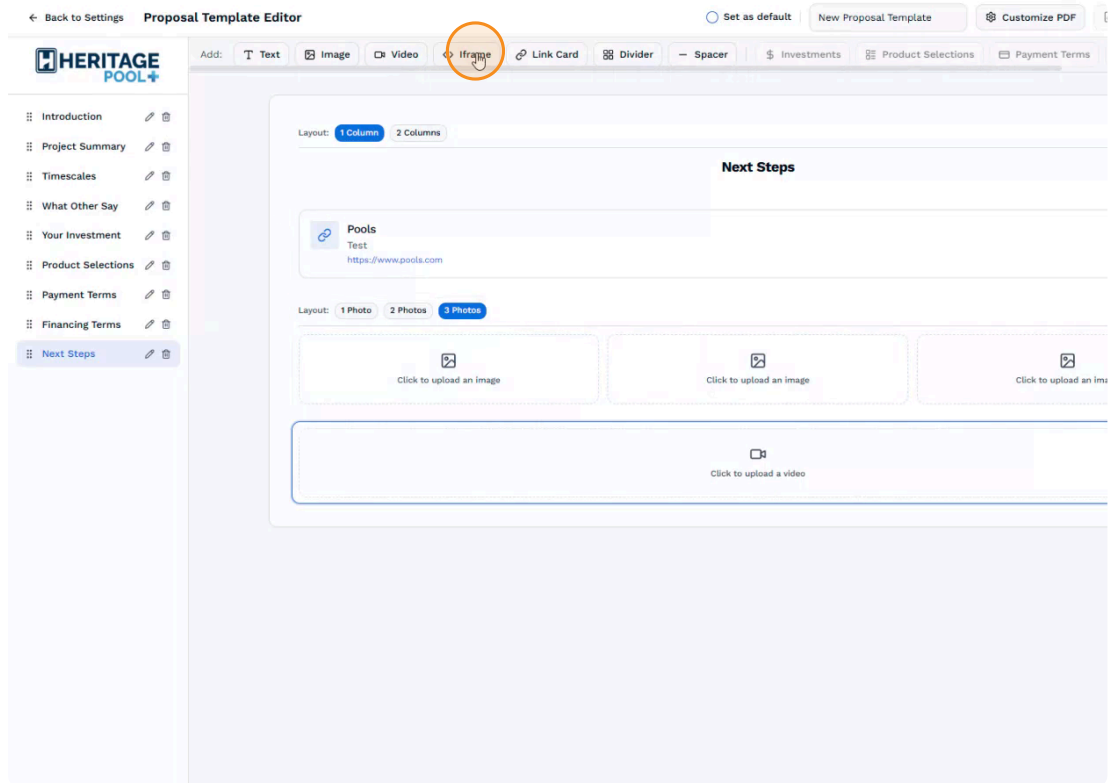
You can change how many images the section can hold.

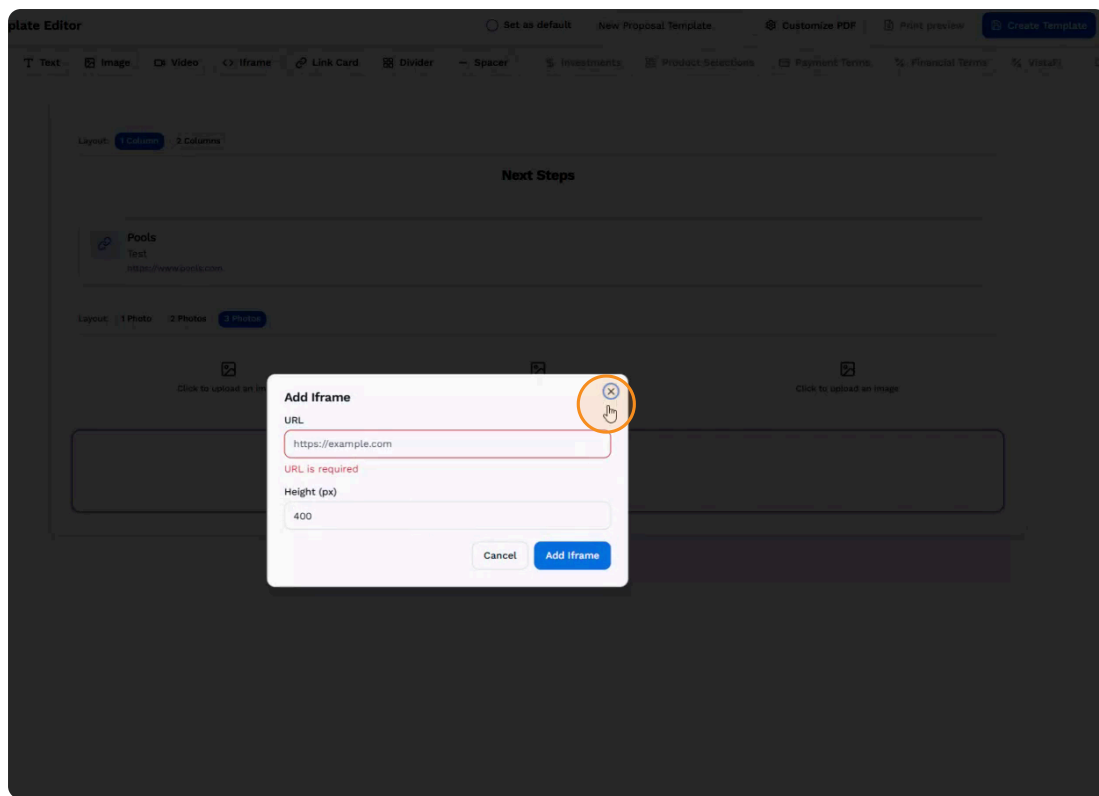


Additionally, you can add a **video iframe** by entering the video URL and specifying the size of the display area.

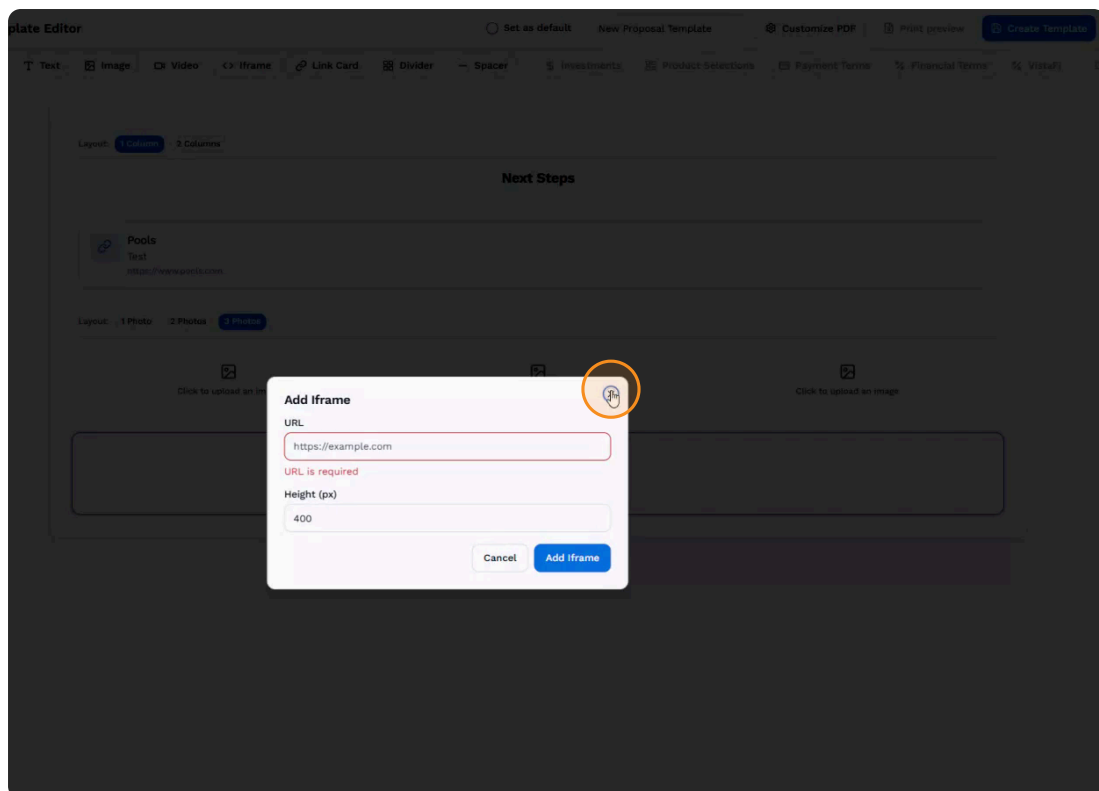


iframe,



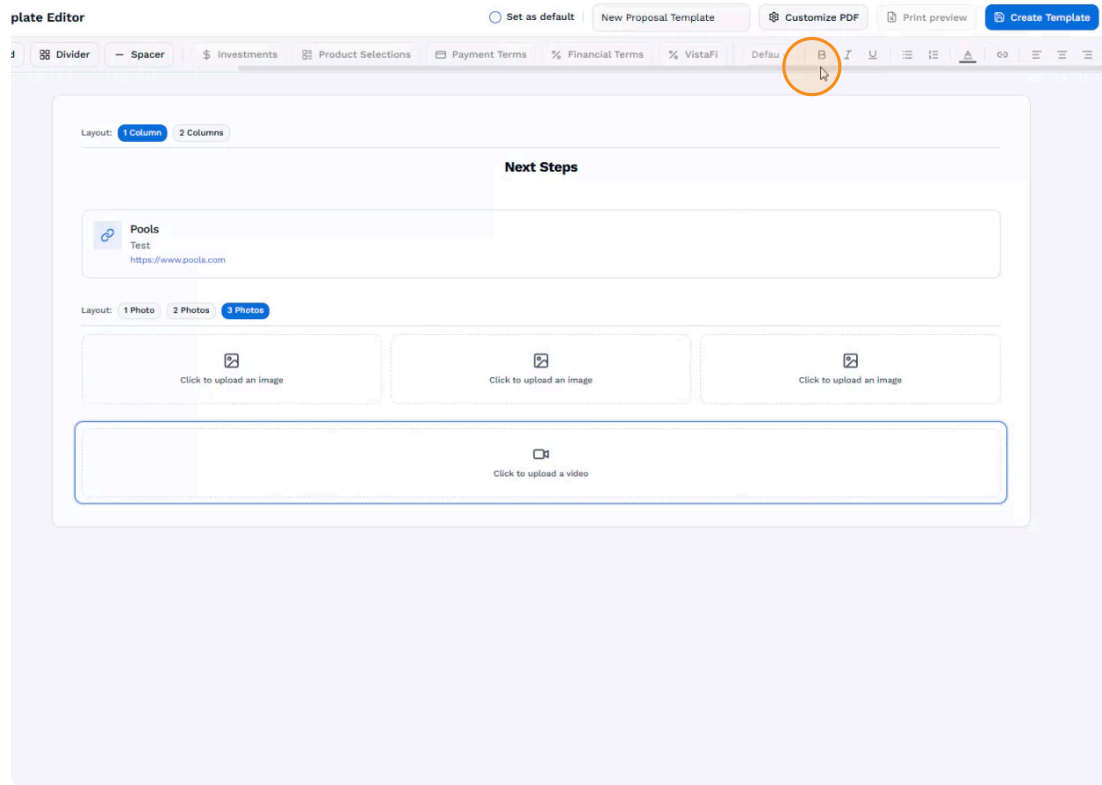


You can also use **dividers** and **spacers** to structure the layout.

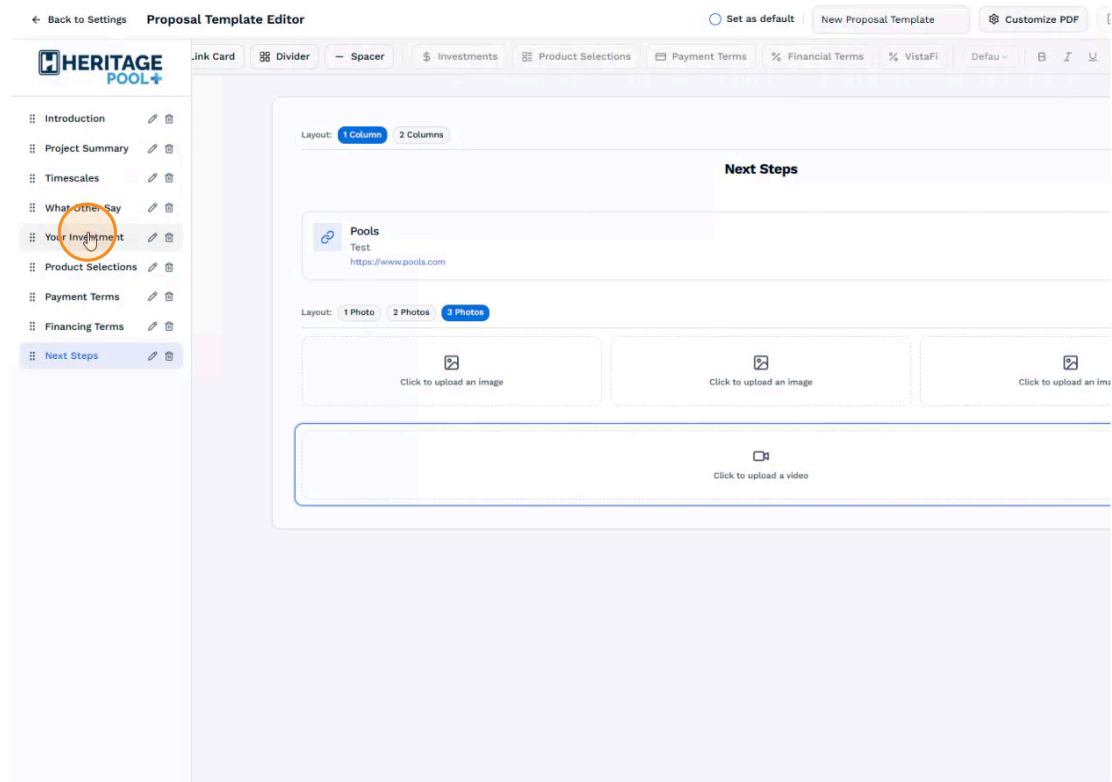


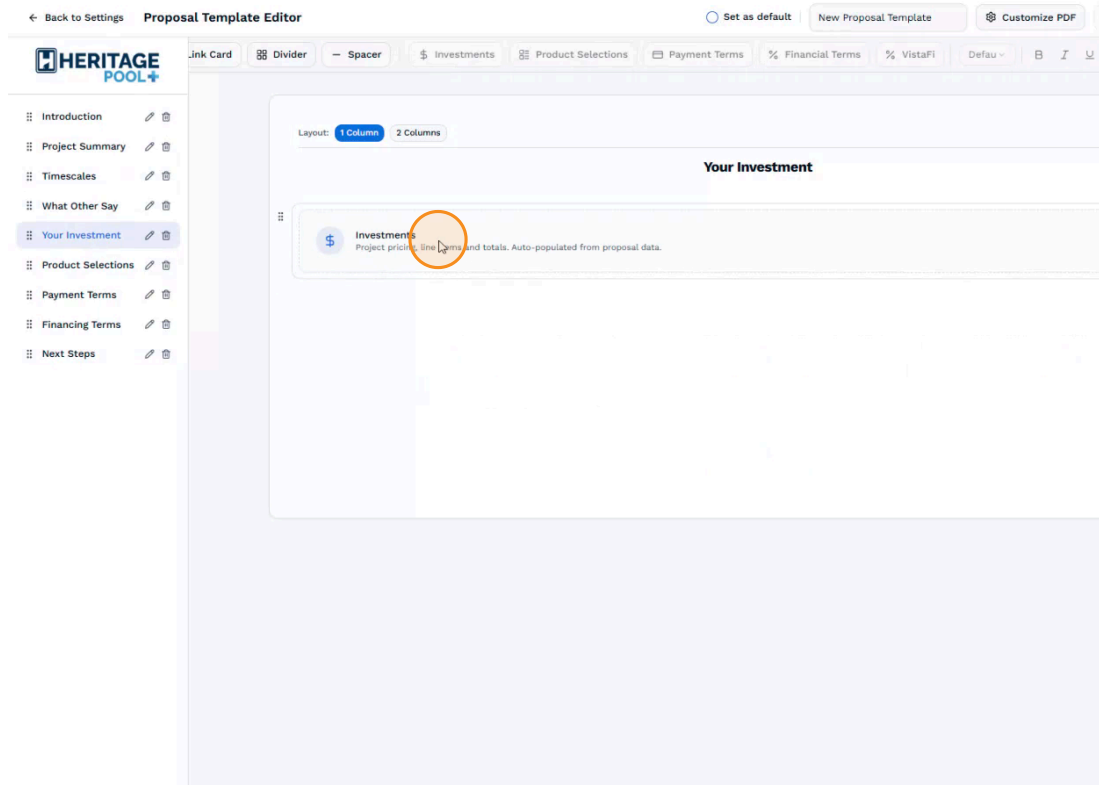
Step 6: Use Embedded Proposal Modules (Investments, Products, Terms)

The objects in the toolbar such as **Investments**, **Product Selections**, **Payment Terms**, **Financial Terms**, and **Vestify** are embedded modules that can be placed within pages.

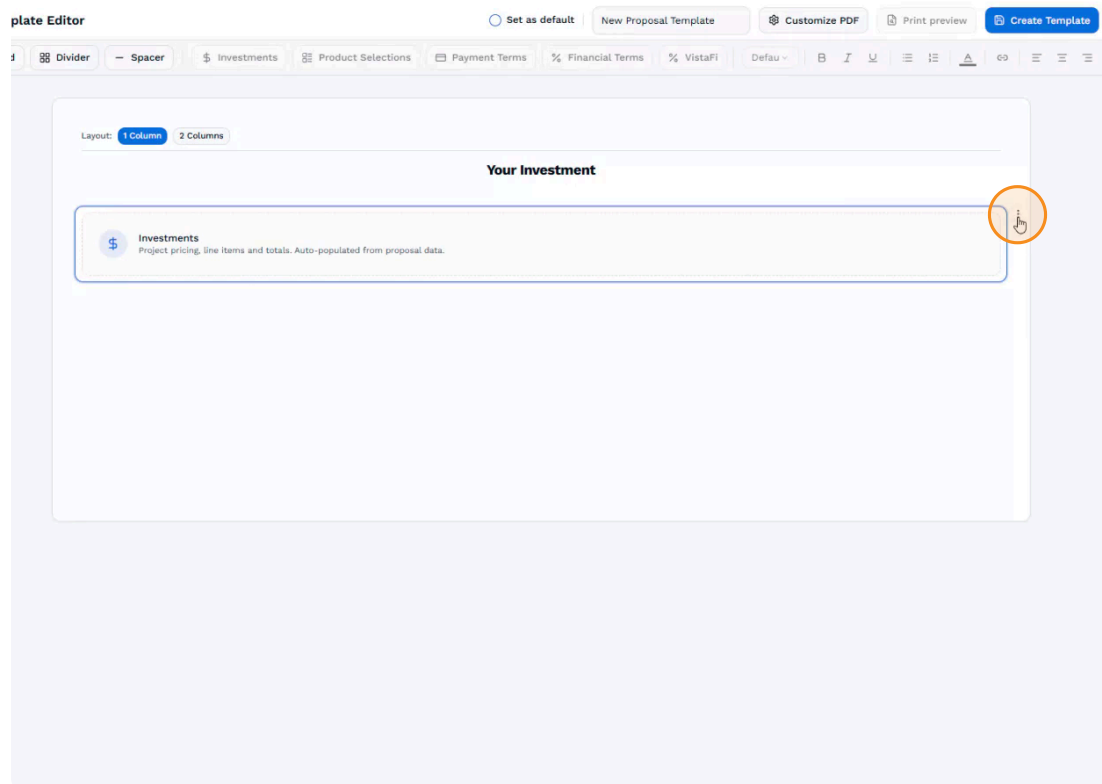


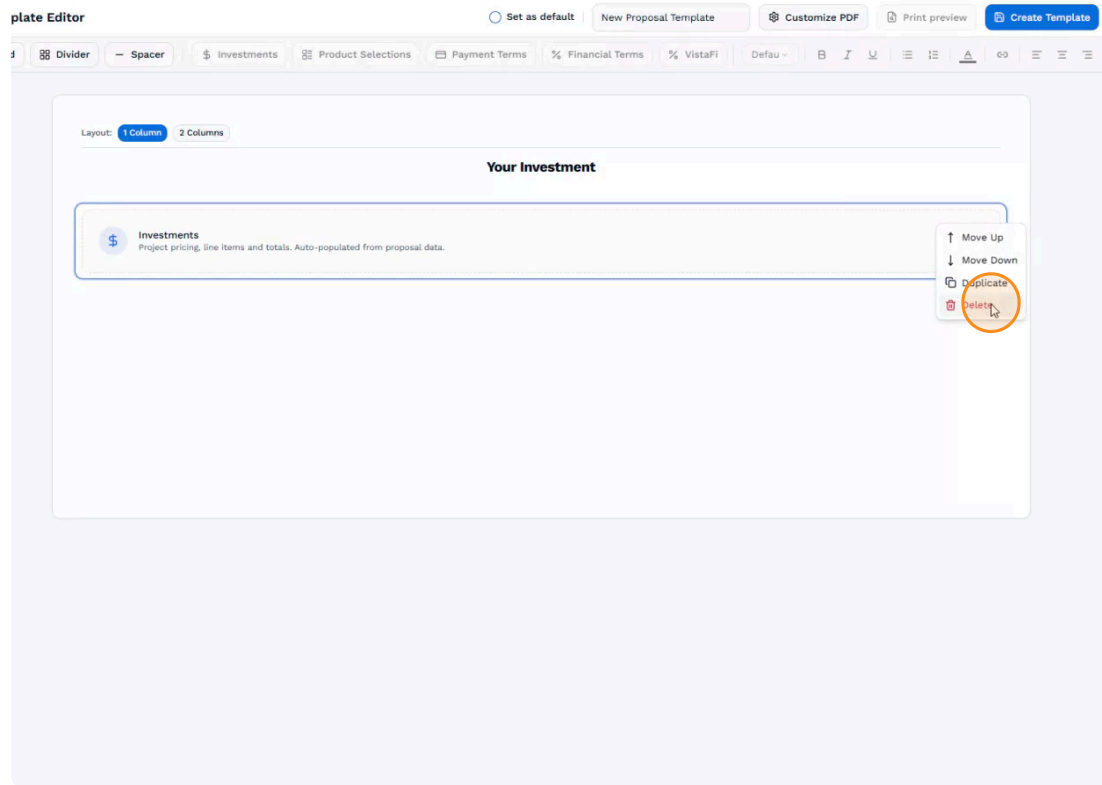
For example, under the **Investment** page, you will see the investment section embedded in the content area.



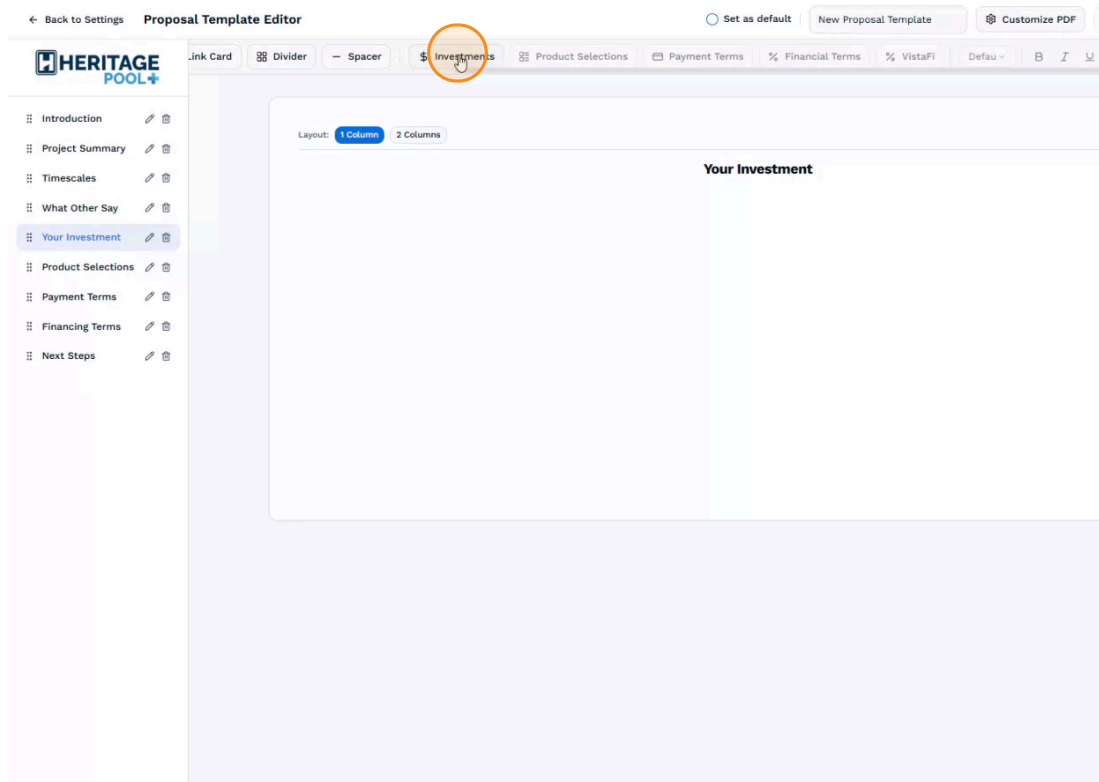


If you remove this section from the page, it becomes available again in the toolbar to be added to any other page.



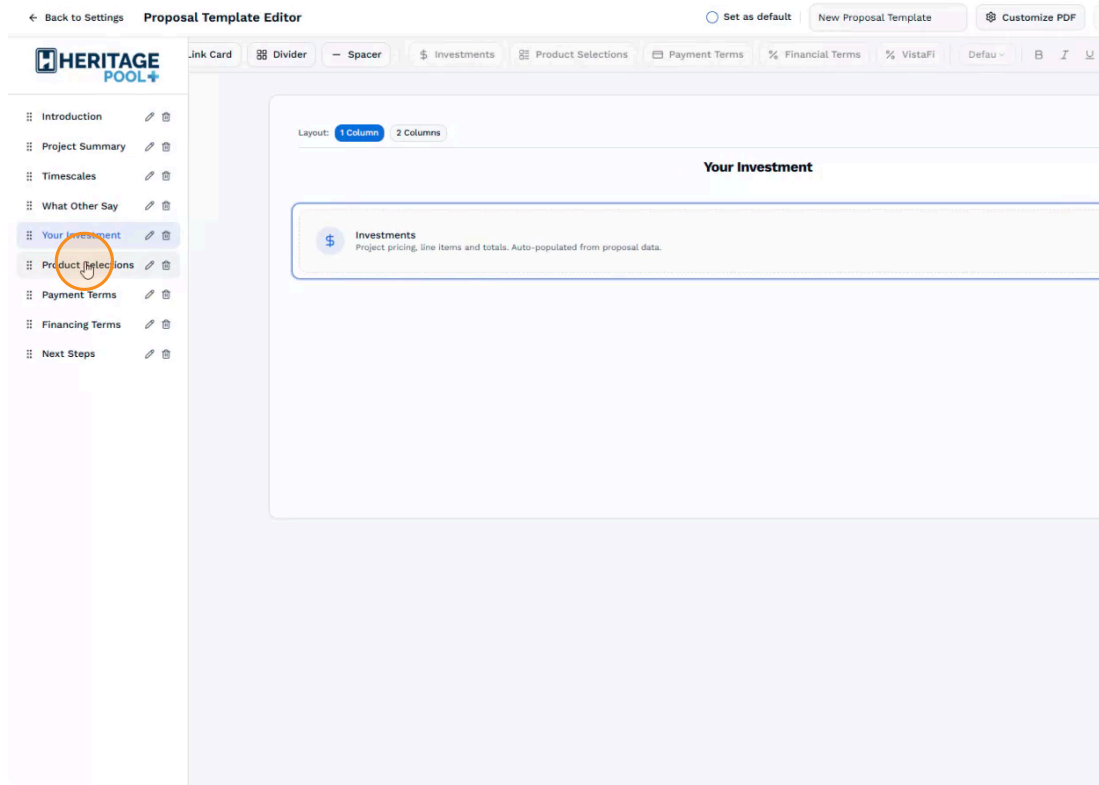


To add it back, go to the desired page, select the investment module, and place it on the page.

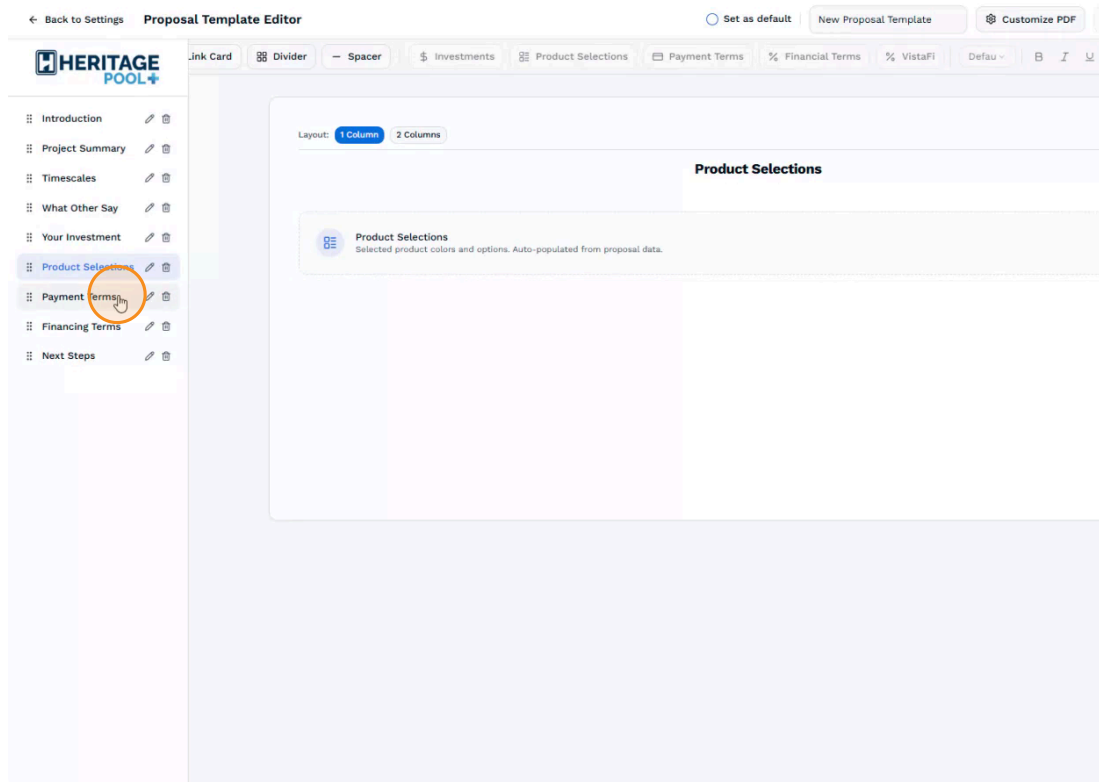


This module will then display all proposal items being proposed to the client.

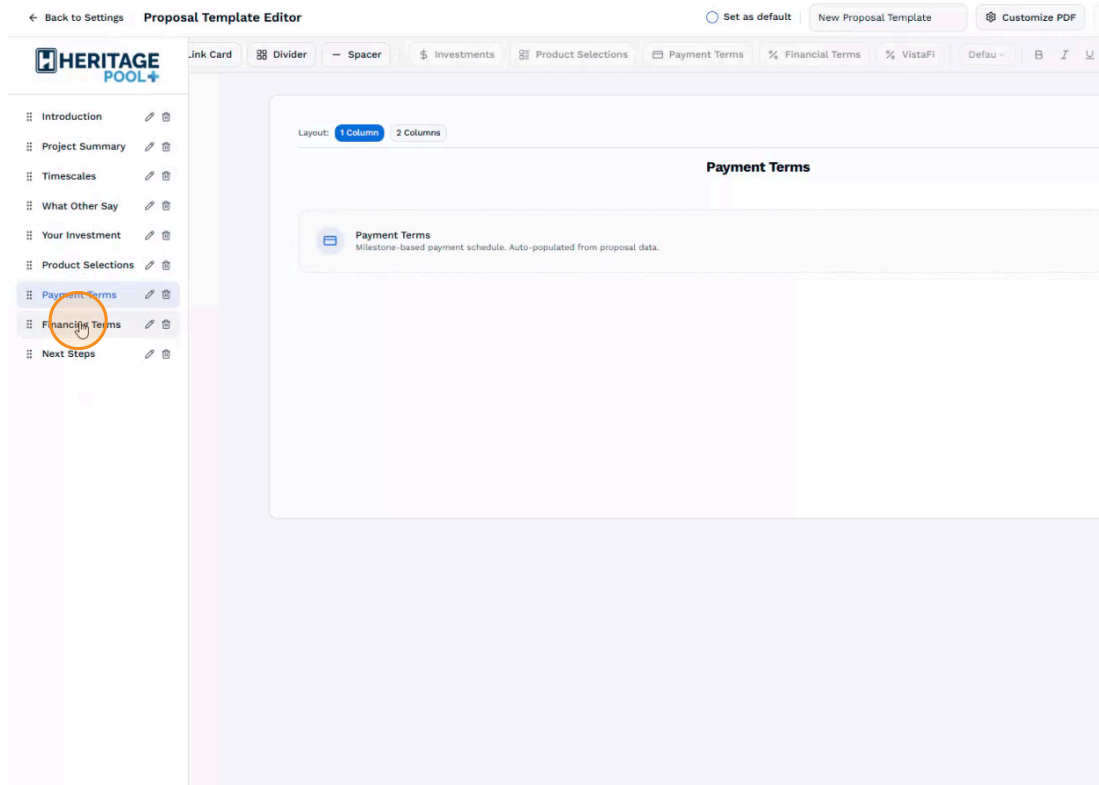
Product Selections will show all product choices made during the quick proposal process (for example, different colors or product types).



Payment Terms will display all payment terms defined for the proposal.

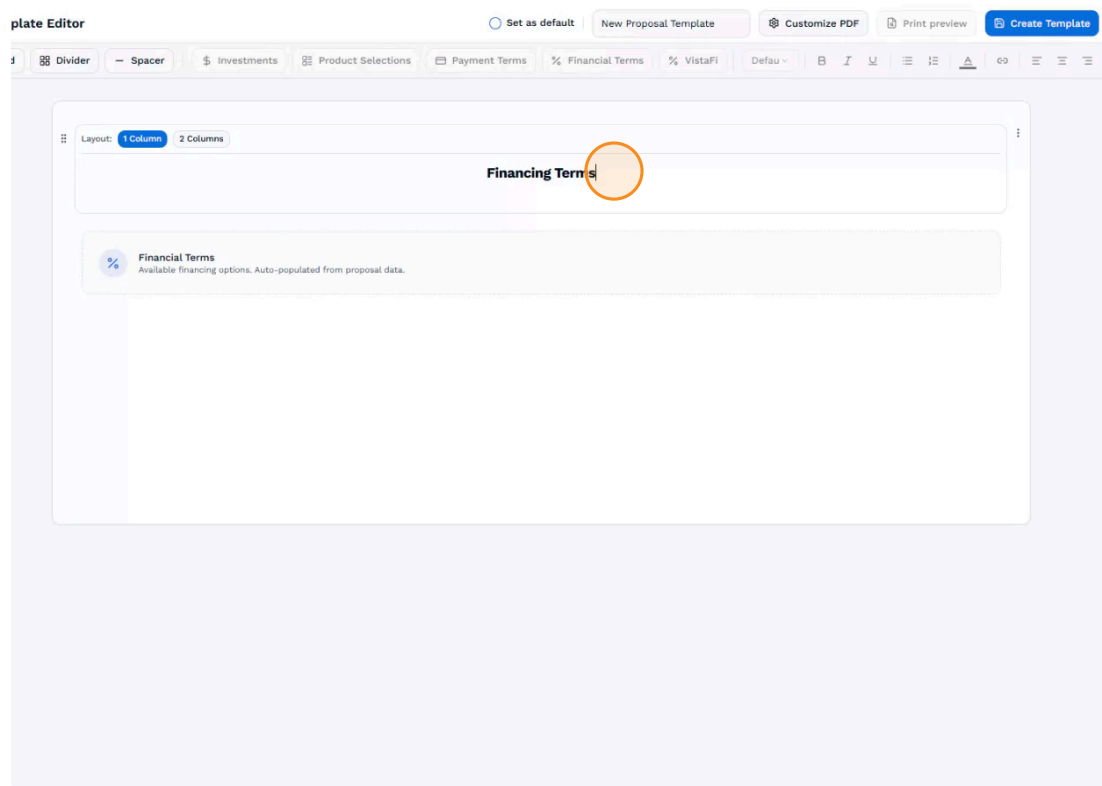


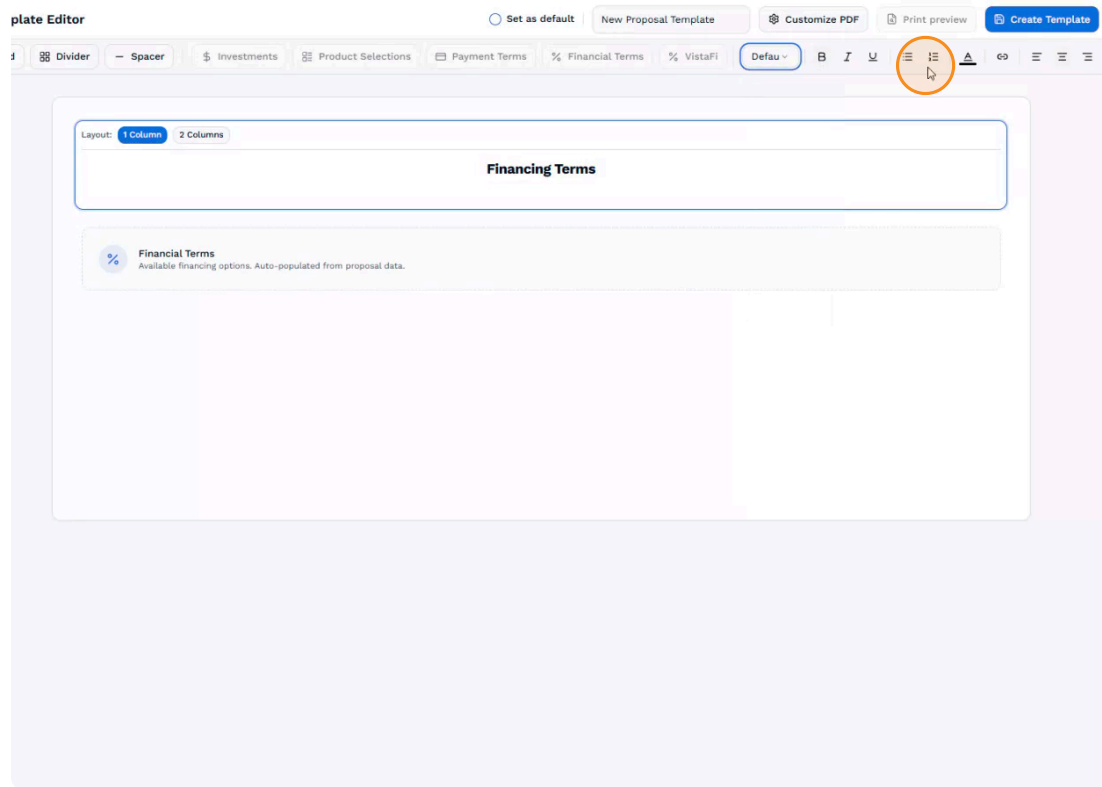
Finance Terms will display all finance terms that have been set.



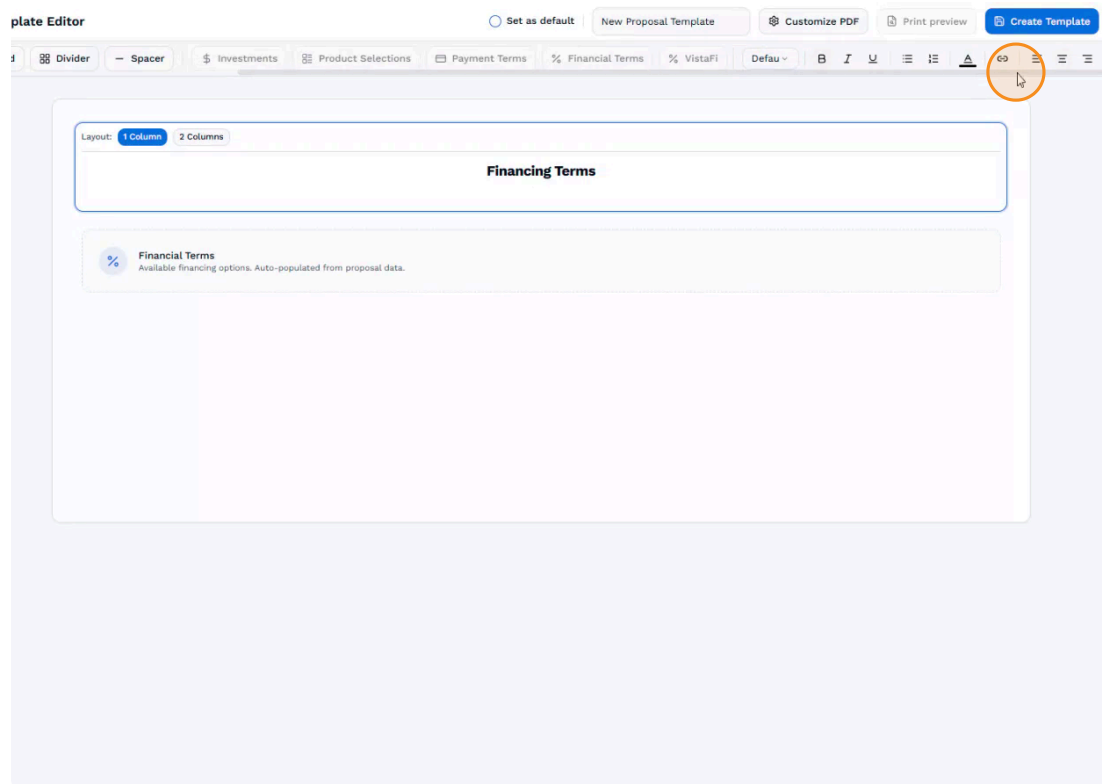
Step 7: Format Text and Layout Within Pages

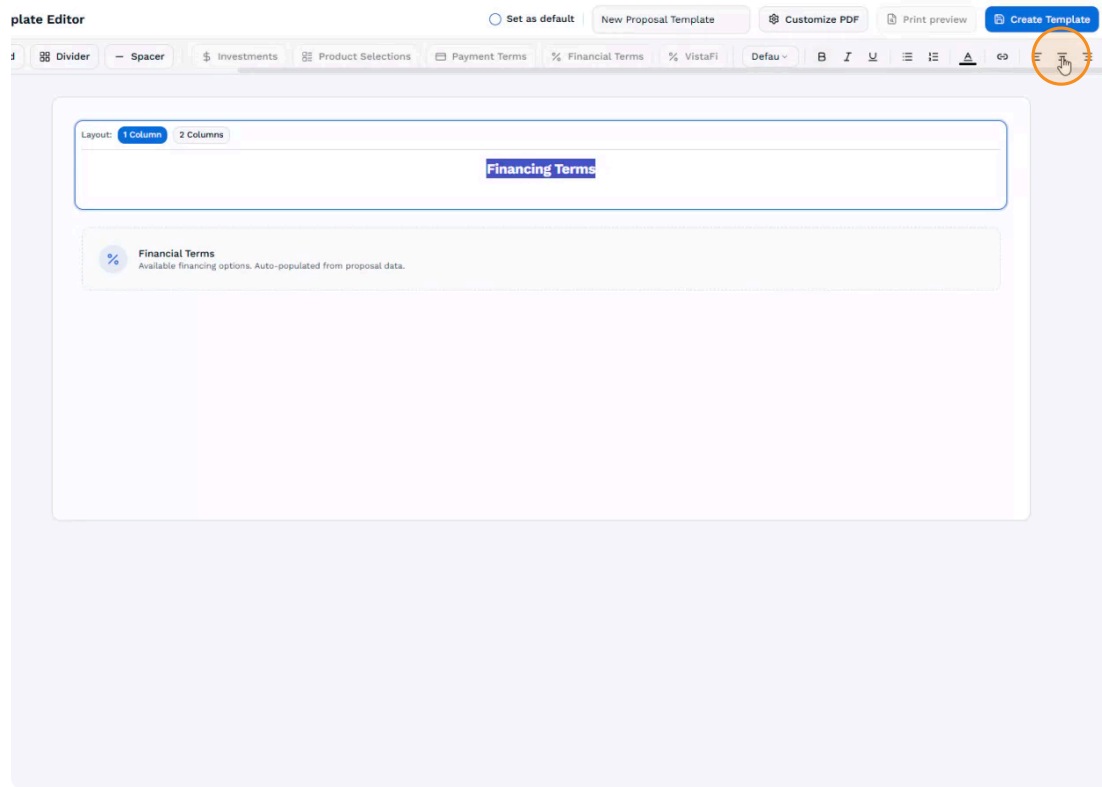
You can modify any text within a page using the text editor controls: change font size, apply bold, italics, underline, bullet points, and text color.



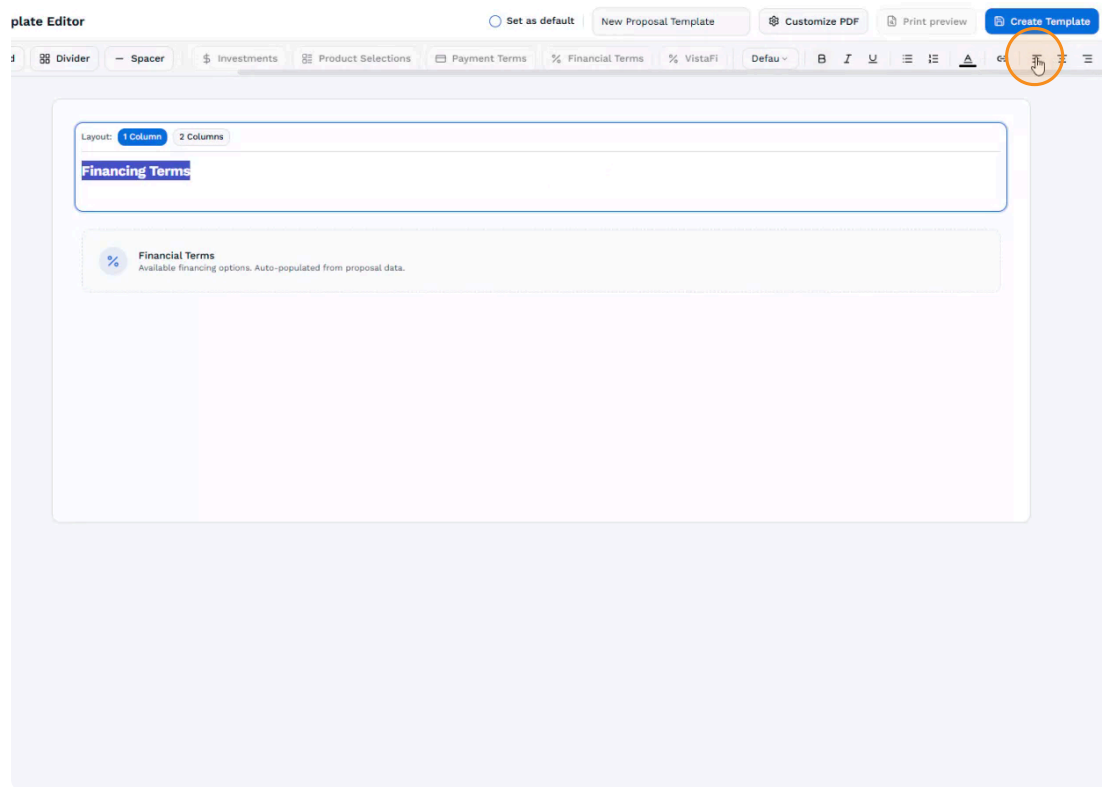


You can also create hyperlinks and adjust margins for better layout and readability.





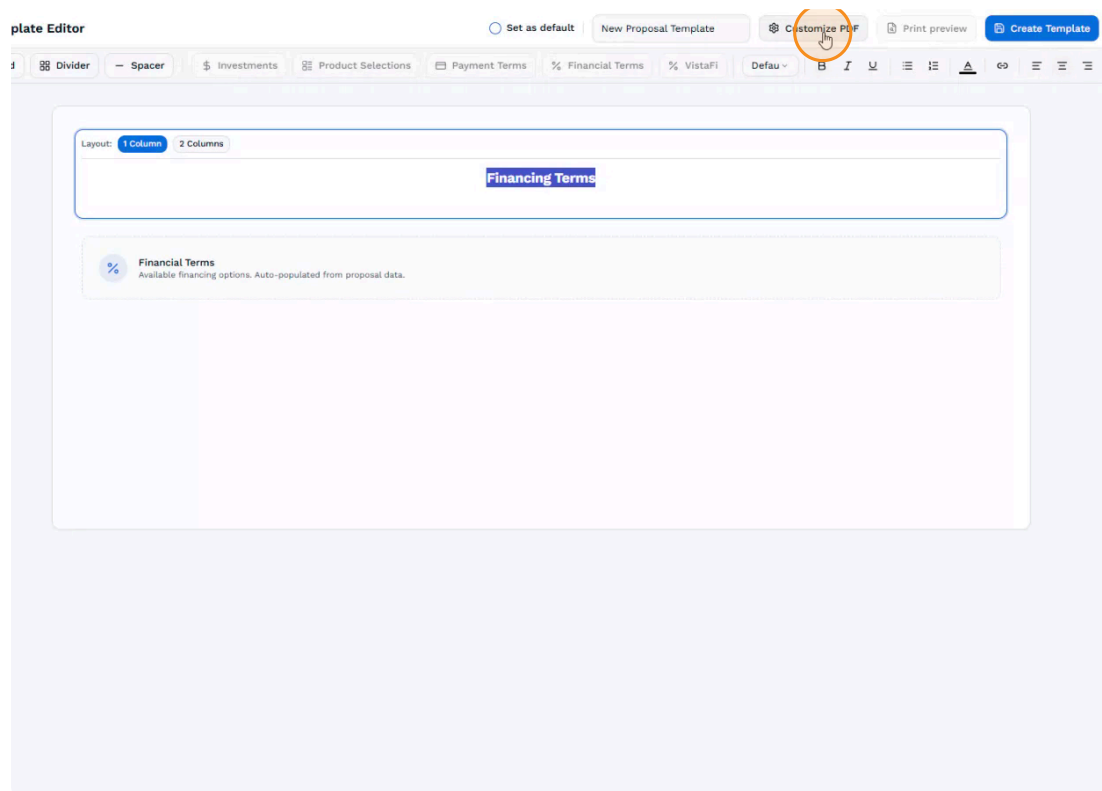
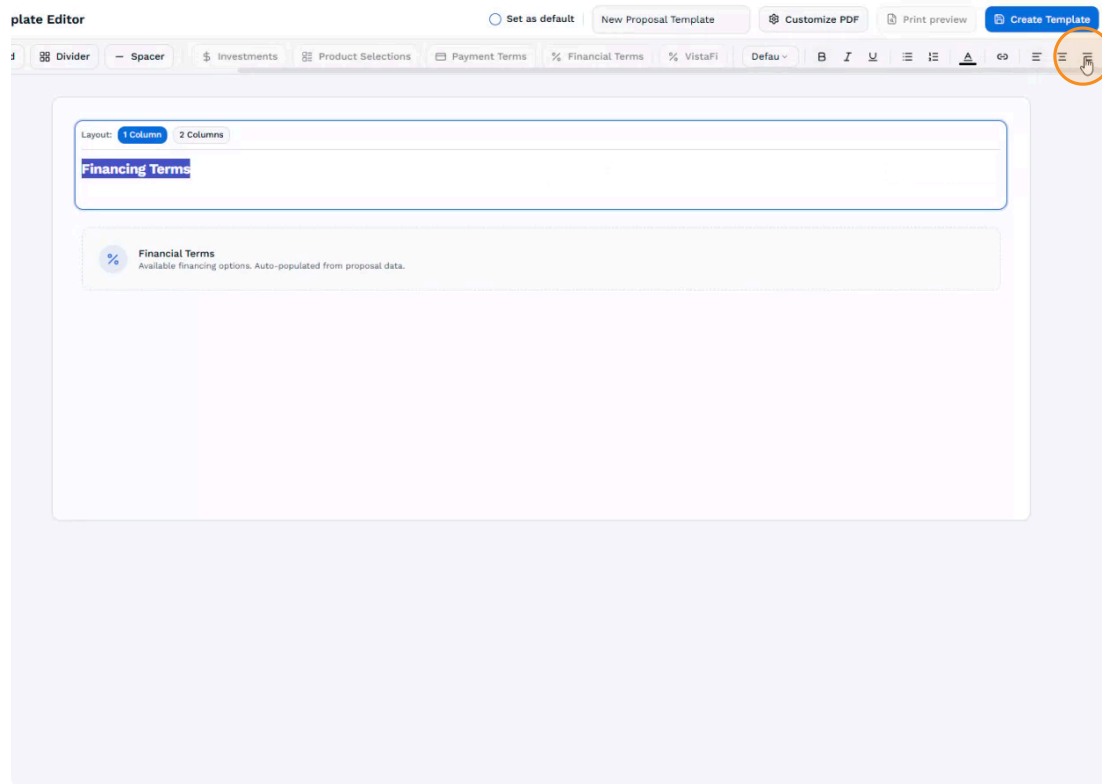
margin



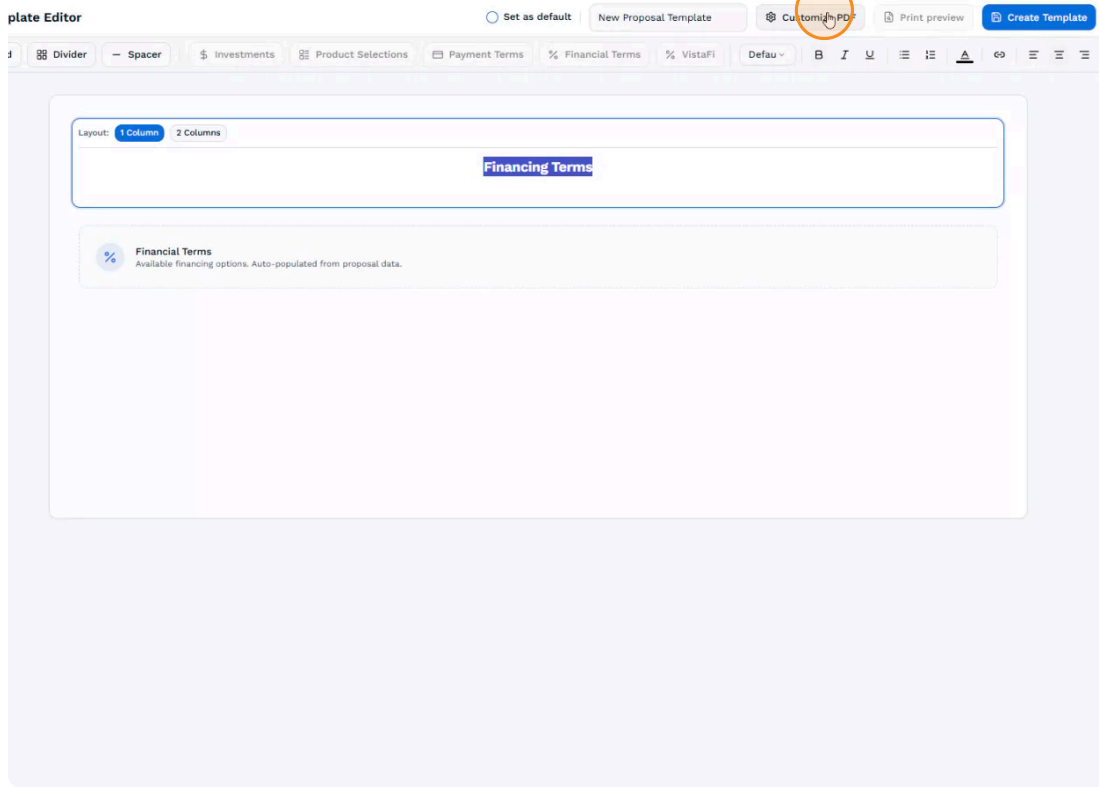
Step 8: Customize the PDF Header Image

Use the **Customize PDF** option to add a header image to the top of the proposal.

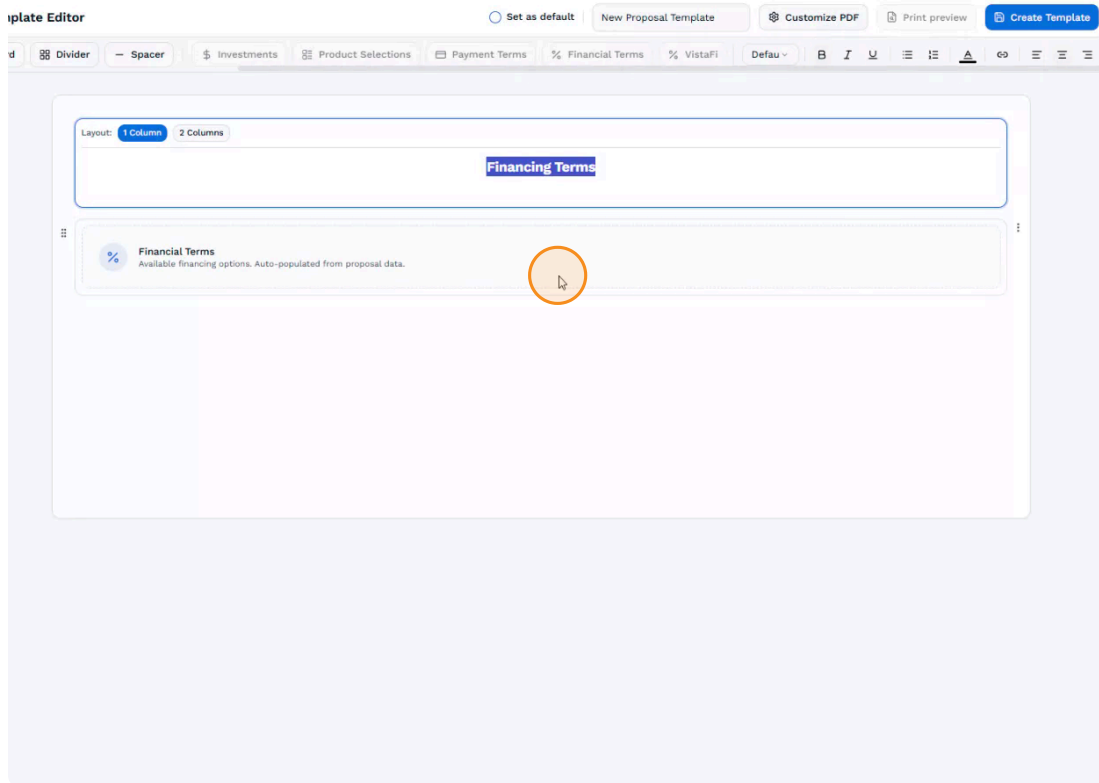
Customize



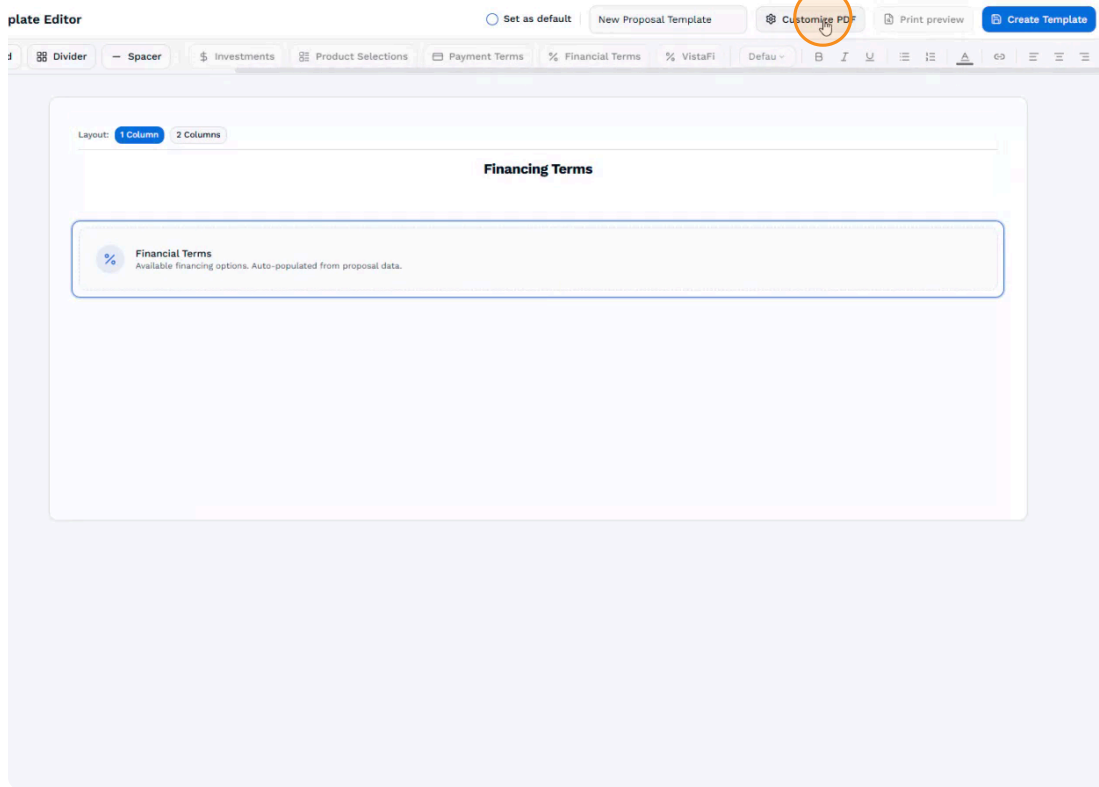
This allows you to select and upload an image that will be used as a presentation banner on the proposal.
allows



you inside of this



area to

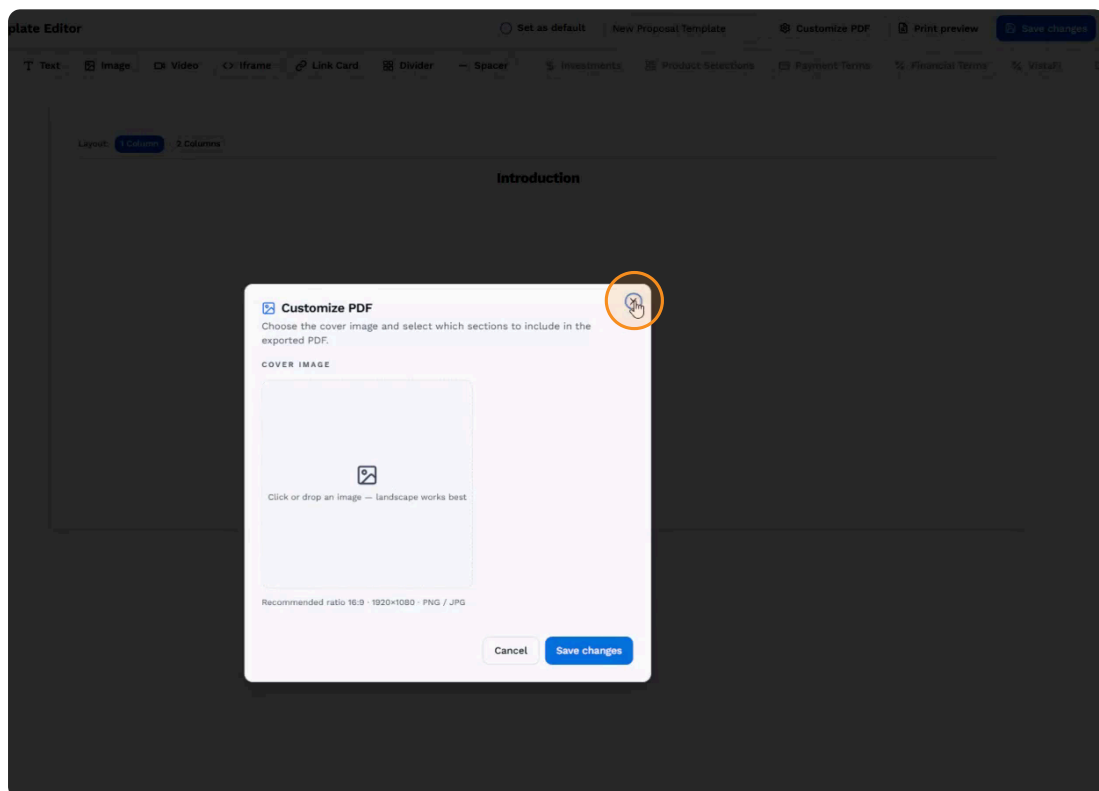


select and click to add an image.

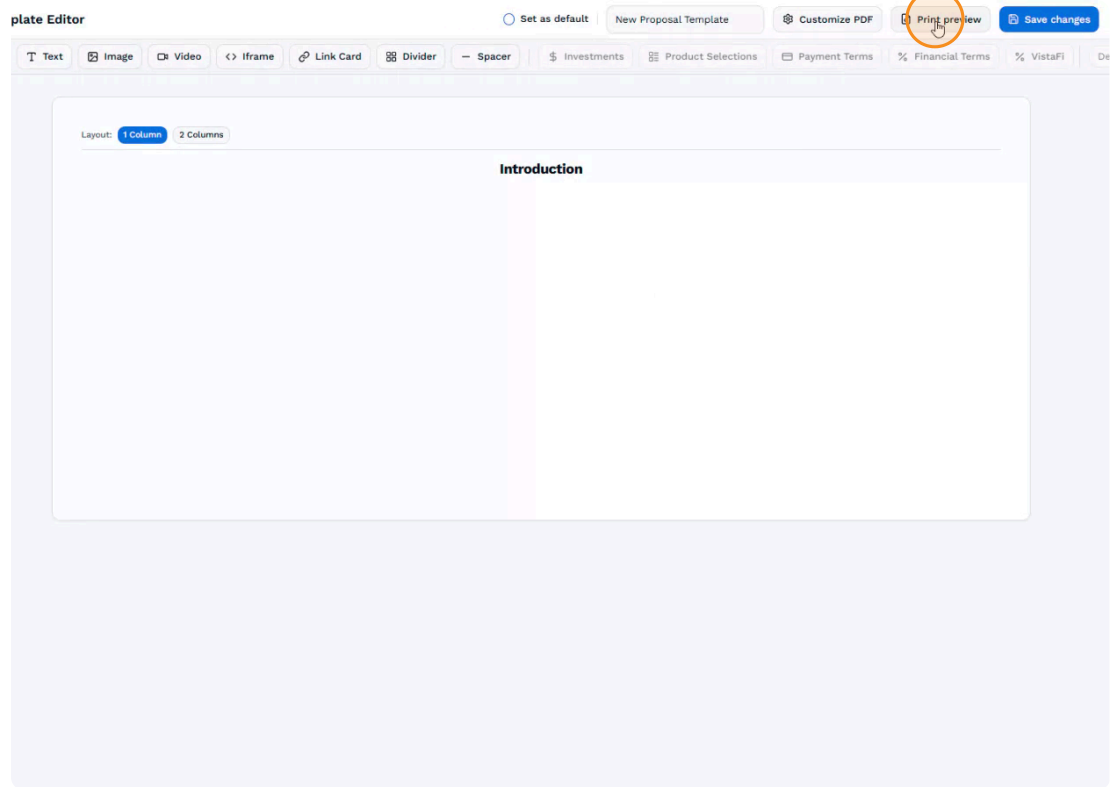
Step 9: Preview, Rename, and Organize the Template

Use **Print Preview** to see how the completed proposal will appear to the client.

Print

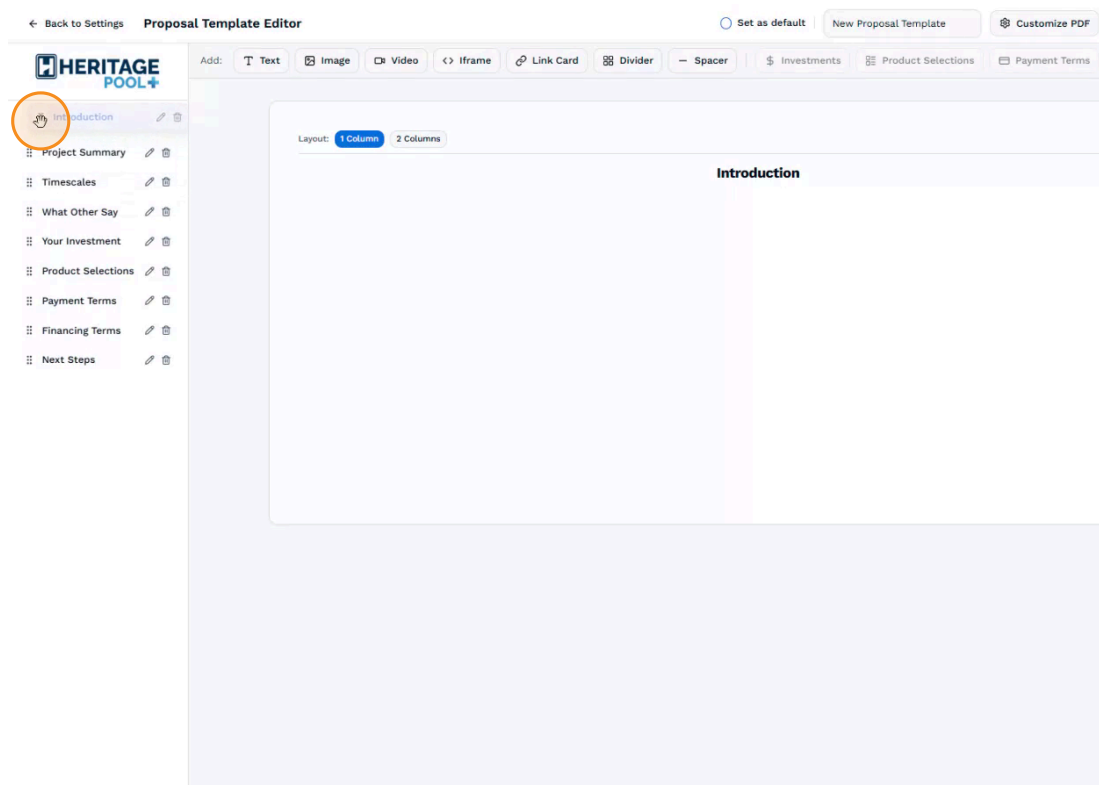


Preview is

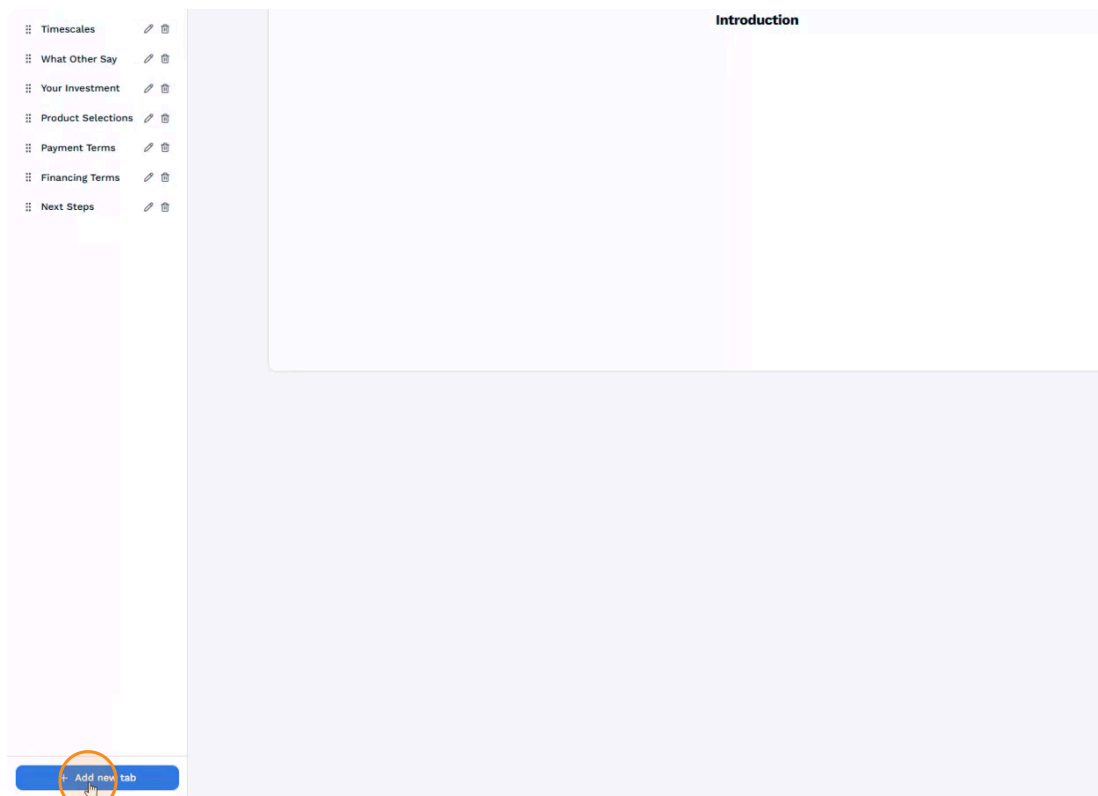


At the top of the screen, you can rename your template and set it as the default template if desired.

You can also reorder pages by moving them into any sequence you prefer, and you can add new pages as needed.



and then you can add new pages



as well.

